

ACADEMIC SENATE MEETING
Wednesday, April 6, 2011
1 – 2:50 p.m. (approx.) ~ Commons 206

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Senators'
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- I. **Approval of agenda**
- II. **Approval of minutes of 03/02/2011 meeting**
- III. **Chair's report:** [Rika Yoshii](#) Referrals to committees
- IV. **Secretary's report:** [Mohammad Oskoorouchi](#) *The following item has been responded to by the university administration:*
 - APC Undergraduate and Graduate Dual-Listed Courses
- V. **Consent Calendar** *The following items are presented to the Senate for a single vote of approval without discussion. Any item may be removed for particular consideration by request of a senator prior to vote.*
 - NEAC Recommendations
 - UCC Course & Program Change Proposals
- VI. **Old Business** *The following items are presented to the Senate for a second reading. At the second reading, the item is official senate business. Debate for or against the motion is made during the second reading, and amendments to the motion are considered. A final vote is taken on whether to approve or, in the case of administrative policies and procedures, endorse.*
 - A. APC Excess Units Seniors – [Aboolian](#)
 - B. FAC Misconduct in Scholarship & Research policy – [Santamaria](#)
- VII. **New Business** *The following items have been moved and seconded, and are presented to the Senate for a first reading. The purpose of the first reading is to discuss the item; no amendments are made to items during the first reading. Comments on first reading items may also be made to the presenters via e-mail or other means. Items become senate motions at the time of the second reading (see Old Business). A motion to move a first reading item to second reading status is permitted, but should be undertaken only after any general discussion has concluded.*
 - A. FAC Sabbatical Leave policy revision – [Santamaria](#)
 - B. FAC CoE RTP policy revision – [Santamaria](#)
 - C. PAC Program Review – [Shaw](#)
 - D. BLP/UCC Single Subject Preparation in History – [Beavers](#) / [Fang](#)
 - E. BLP/UCC Single Subject Credential Program/English Language Authorization with Option for Preliminary Mild/Moderate Education Specialist Credential – [Beavers](#) / [Fang](#)
 - F. BLP/UCC Bachelor of Science in Business Administration / Temecula campus – [Beavers](#) / [Fang](#)
 - G. APC Inactive Courses policy revision – [Aboolian](#)
 - H. APC Graduation Requirements policy revision – [Aboolian](#)
 - I. SAC Student Grade Appeals policy revision – [Meilich](#)
- VIII. **Information items**
 - Fundraising update – Genung *Time certain 2:30 pm*
- IX. **President's report:** Karen Haynes
- X. **Provost's report:** Emily Cutrer
- XI. **VP-Student Affairs report:** Eloise Stiglitz
- XII. **ASCSU report:** [Brodowsky/Montanari](#)
- XIII. **CFA report:** [Don Barrett](#)
- XIV. **ASI report:** Amanda Riley
- XV. **Committee reports** See written reports.
- XVI. **Senators' Concerns and Announcements**

REFERRALS TO COMMITTEE

APC New policy re second bachelor's degree in light of recently approved program for a second degree in Nursing
 BLP Formalize procedure for initiation of programs and migration of courses and programs to and from self support
 GEC Consider impact of multiple majors to upper division GE credit

CONSENT CALENDAR

NEAC Recommendation

Committee	Seat (#)	Term	Name(s)
Faculty Scholarship Committee	CoBA	11/12-12/13	Wayne Neu

UCC Course & Program Change Proposals

SUBJ	#	New #	Course/Program Title	Type	Originator	Rec'd AP	To UCC	UCC Action
ANTH	391		Anthropological Theory	C	Bonnie Bade	3/1/11	3/9/11	3/28/11
BIOT	600		Genomics & DNA/RNA Technologies	C-2	Betsy Read	3/1/11	3/9/11	3/14/11
ECON	444		International Economics: Labor	C	Ranjeeta Basu	3/29/11	3/30/11	4/4/11
EDML	553	653	Bi-literacy Education BCLAD I	C-2	R Diaz-Greenberg	3/18/11	3/23/11	4/4/11
EDML	554	654	Bi-literacy Education BCLAD II	C-2	R Diaz-Greenberg	3/18/11	3/23/11	4/4/11
EDML	563	655	Application of ELD Curriculum Practicum	C-2	R Diaz-Greenberg	3/18/11	3/23/11	4/4/11
EDUC	P-2		Intern Partnership/Prelim Level I Ed Spec	P-2	J Thousand	11/10/10	11/19/10	3/7/11
EDUC	P-2		Concurrent Preliminary Level I Ed. Specialist	P-2	J Thousand	11/10/10	11/19/10	3/7/11
EDUC	P-2		Internship Partnership with Service Area Schools	P-2	J Thousand	11/10/10	11/19/10	3/7/11
EDUC	P-2		Preliminary Level I Ed Specialist Mild/Moderate	P-2	J Thousand	11/10/10	11/19/10	3/7/11
EDUC	P-2		Master of Arts in Ed: Option 3 - Spec. Ed Level I	P-2	J Thousand	11/10/10	11/19/10	3/7/11
EDMX	570		Education Specialist - Clinical Practice: Elem.	C	J Thousand	11/10/10	11/19/10	3/7/11
EDMX	573		Education Specialist - Clinical Practice: Moderate/ Severe Disabilities	C	J Thousand	11/10/10	11/19/10	3/7/11
EDMX	575		Education Specialist - Transition Development Plan	C	J Thousand	11/10/10	11/19/10	3/7/11
EDMX	622		Literacy for Education Specialists	C-2	J Thousand	11/10/10	11/19/10	1/31/11
EDMX	634	635	Education Specialist – Curriculum and Instruction	C-2	J Thousand	11/10/10	11/19/10	1/31/11
EDUC	P-2		MA in Education, General Option	P-2	Carol Van Vooren	2/8/11	3/8/11	3/14/11
EDUC	630		IB Primary Years Program: Theory to Practice	C	Carol Van Vooren	2/8/11	3/2/11	3/14/11
EDUC	631		IB Primary Years Program: Instruction to Action	C	Carol Van Vooren	2/8/11	3/2/11	3/14/11
EDUC	632A		IB Field Study: Theory to Practice	C	Carol Van Vooren	2/8/11	3/2/11	3/14/11
EDUC	632B		IB Field Study: Assessment to Action	C	Carol Van Vooren	2/8/11	3/2/11	3/14/11
EDUC	633		IB Middle Years Program: Theory to Practice	C	Carol Van Vooren	2/8/11	3/2/11	3/14/11
EDUC	634		IB Middle Years Program: Instruction to Action	C	Carol Van Vooren	2/8/11	3/2/11	3/14/11
GRMN	380		German Culture through Film	C	Marion Geiger	3/29/11	3/30/11	4/4/11
KINE	305		Applied Kinesiology	C-2	Jeff Nesler	3/9/11	3/23/11	3/28/11
MATH	P-2		Minor in Mathematics	P-2	Andre Kundgen	3/9/11	3/23/11	3/28/11
MUSC	180		Topics in Music	C	Bill Bradbury	3/9/11	3/23/11	3/28/11
MUSC	380		Topics in Music	C	Bill Bradbury	3/9/11	3/23/11	3/28/11
SPAN	695		Supervised Teaching of Spanish at University Level	C-2	S Rolle-Rissetto	3/9/11	3/23/11	3/28/11
TA	489		Production and Performance	C-2	Judy Bauerlein	3/1/11	3/9/11	4/4/11
TA	489S		Theatre Production in Spanish	C-2	Judy Bauerlein	3/1/11	3/9/11	4/4/11
VPA	380		Topics in the Arts	C-2	Judy Bauerlein	3/9/11	3/23/11	3/28/11
WMST	P-2		Bachelor of Arts in Women's Studies	P-2	Sheryl Lutjens	3/29/11	3/30/11	4/4/11

2nd Reading – APC: Excess Units Seniors

Summary of changes to Excess Units Seniors policy:

We need to note that the policy was approved by the Senate in 09/10, but not by the administration, so the changes are being made to the Senate's proposal rather to an existing approved policy. The most significant changes to the policy are as follows:

The definition of the super senior was simplified and changed to student that have completed over 150 units which is better aligned with the CSU guidelines provided to campuses to define "Super Seniors" to be a total degree units (120 for CSUSM) plus 20% which is roughly at 144 units. The 150 unit threshold was adopted since CSUSM has many transfer students that come in with excess units. The previous policy definition of "N+11" with the many variances of calculations that was dependent on whether students had double majors, additional minors, were transfer students or not and it was too complex to find out which students were considered a super senior. Under the old definition of "N+11" students over 131 units would become super seniors which presented a significant load to campus advising units to review and intercede and was the basis why the Advising expressed significant reservations. With the change to 150 units the Advising agree that it is best aligned with their resources.

In addition CSU guidelines also suggested a petition processes be implemented to allow for due process for students degree goals and objectives. The latest version of the policy allows for that petition process. The newest policy is more balanced to be student friendly with their academic goals and objectives, aligned with campus resources to address the super seniors, represents a fair and structured methodology to track excess unit students and to guide them to degree completion.

Rationale: *The Chancellor's Office has asked each campus to have a policy on excess-units seniors (aka Super Seniors) to better manage our enrollment. This policy increases access for students by redirecting enrollment from students who already have earned over 150 units to students who are trying to make progress toward graduation, and it can also increase the number of prospective students that the University can admit.*

Definition: This policy defines the term "excess-units seniors", outlines the procedure for facilitating graduation of such students, and gives a policy to prevent "excess-units seniors."

Scope: All CSUSM undergraduate students seeking a first baccalaureate degree.

Authority: The President of the University.

I. EXCESS-UNITS SENIORS

The term "excess-units senior" will be used in this document to describe students seeking a first baccalaureate degree who have earned 150¹ or more units and who have not yet graduated. There are two different groups of excess-units seniors: the first group has already applied for graduation, and the second group has not applied for graduation. For both groups, intrusive advising shall be used to facilitate their graduation.

II. EXCESS-UNITS SENIORS WHO HAVE APPLIED FOR GRADUATION

A. Advisors shall review the student's Degree Progress Report to determine the student's graduation status and determine if the student is on track and will be able to graduate on time.

B. If the student has all the courses needed to graduate with their declared major(s)/minor(s); the advisor will notify the Registrar who will automatically graduate the student at the earliest opportunity (see V for the appeal procedure).

C. If it is determined that it will not be possible for the student to graduate as planned, the following procedure shall be followed.

1. The advisor shall review the student's records for possible course substitution approvals from appropriate departments or programs to graduate the student on time.

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2. The student shall be given the earliest priority registration date to facilitate enrollment in outstanding course requirements.
3. The advisor will change the student’s expected graduation term to keep the student in the graduation review process.
4. A special notation shall be placed on the student record indicating to the student that their graduation has been changed to the expected semester of completion; and an email will be sent to the student encouraging the student to complete the requirements on time, and to utilize advising services as a resource for planning a timely graduation.

III. EXCESS-UNITS SENIORS WHO HAVE NOT APPLIED FOR GRADUATION

For students who have not applied for graduation the following procedure shall be followed:

- A. Advisors shall review the student’s Degree Progress Report to determine the student’s graduation status.
- B. If the student already has all the courses needed in his/her declared major(s)/minor(s) to graduate; advisors will notify the Registrar who will automatically graduate the student at the earliest opportunity (see V for the appeal procedure).
- C. If the student has remaining requirements to complete, an email shall be sent urging the student to review their Degree Progress Report and come in for an advising session for timely graduation planning.
 - o An advisor will create a graduation completion plan outlining necessary courses by semester. This plan shall be emailed to the student and a copy shall be kept in the student’s file.
 - o The advisor will apply automatically for the student’s expected graduation term. The Advisor will change student’s expected graduation term as necessary to keep the student in the graduation review process.
 - o A hold will be placed on the student which will be removed by the student submitting a signed copy of the graduation completion plan.

IV. PREVENTION OF EXCESS-UNITS SENIORS

Students with more than 130ⁱⁱ attempted units may only change their majors if the change of major allows for graduation at a date no later than the earliest date possible with current major. Similarly, students with more than 130 attempted units may only declare additional major(s) or minor(s) if the additional major(s) or minor(s) allow for graduation at a date no later than the earliest date possible with first major. In these cases, approval from a staff advisor in Advising Services will be needed. Exceptions to the 130 units limit can be granted by an appropriate faculty advisor such as the department chair or designee.

V. APPEALS PROCEDURES

Students choosing to appeal their graduation must submit a Degree Conferral Appeal. The appeal must include a narrative statement elaborating how excess units were accumulated, their educational intent, and completion timelines. The appeal will be reviewed by a committee consisting of Dean or Designee from the College of the students major, a designated academic advisor from the student’s major, and an appropriate faculty representative from the student’s academic department/program.

ⁱ This limit does not apply to Nursing, and Integrated Credential Program students
ⁱⁱ This limit does not apply to Nursing, and Integrated Credential Program students

2nd Reading – FAC: Misconduct in Scholarship and Research

Rationale: This set of policy and procedures are intended to carry out our institution's responsibilities under the Public Health Service (PHS) Policies on Research Misconduct, 42 CFR Part 93. This policy applies to allegations of research misconduct (fabrication, falsification, or plagiarism in proposing, performing, or reviewing research, or in reporting research results) in research including research that is governed by federal funding regulations.¹

Definition A policy for investigating allegations of possible misconduct in all research including research funded by external sponsors administered by the University.

Authority The President of the University.

Scope This set of policy and procedures apply to individuals at CSUSM engaged in research projects including those governed by federal funding regulations. This policy applies to any person paid by, under the control of, or affiliated with CSUSM, such as scientists, trainees, technicians and other staff members, students, fellows, guest researchers, or collaborators.

I. Purpose

A. It is the policy of California State University, San Marcos ("University") to adhere to and promote the highest ethical standards of conduct in research and creative activities. Despite extremely rare occurrences, misconduct in research can have a significant impact on the reputation and credibility of the University, its faculty and students, and therefore it cannot be tolerated. The purpose of this policy is to provide the University with a set of procedures for investigating and reporting instances of alleged or apparent misconduct in research and creative activity.

This policy is also intended to conform to the requirements of the appropriate funding agencies (e.g., Health and Human Services [HHS], National Science Foundation [NSF], National Institutes for Health [NIH]) pursuant to the United States Office of Research Integrity (ORI) [45 CFR, Part 689] and the Public Health Service (PHS) Policies on Research Misconduct [42 Code of Federal Regulations (CFR) 93].

This policy shall apply to University administrators, faculty, and staff, and students [11] conducting any research including research funded by external sponsors administered by the University.

Every effort has been made to ensure compliance with current Collective Bargaining Agreements for University employees. No part of this policy should be considered as a substitute for any part of the Agreements. Collective Bargaining Agreements do not supplant [12] 42 CFR Part 93 requirements.

II. Definitions

A. Research misconduct is defined as fabrication, falsification, plagiarism, in proposing, or reviewing research, or in reporting research results. Fabrication is making up data or results or recording or reporting them. Falsification is manipulating research materials, equipment, or processes, or changing or omitting data or research results such that research is not accurately represented in the research record. Plagiarism is the appropriation of another person's ideas, processes, results, or words without giving appropriate credit. Misconduct does not include honest error or honest differences in opinion.

A-B. Preponderance [13] of the evidence means proof by information that, compared with that opposing it, leads to the conclusion that the fact at issue is more probably true than not (42 CFR 93.219).

III. General Provisions

¹ This policy was largely informed by the Senate approved Cal Poly Pomona Misconduct in Research Policy. In its creation, FAC has worked collaboratively with the AVPR of CSUSM and the AVPR of Cal Poly Pomona. This policy is aligned with expectations suggested by the Office of Research Integrity (ORI).

43 A. The University shall make a good faith effort to protect the privacy of all individuals involved in
44 research misconduct proceedings. Disclosure of identity of those involved in the proceedings shall be
45 limited, to the extent possible, to those who need to know, consistent with a thorough, competent,
46 objective and fair research misconduct proceeding, and as allowed by law. Misconduct of externally
47 funded research must be reported to the relevant funding agency. The University must disclose the
48 identity of individuals against whom allegations of research misconduct are made and complainants of
49 research misconduct related to PHS supported activities to the United States Office of Research Integrity
50 ("ORI"). To the extent permitted by the applicable laws, confidentiality shall also be maintained for any
51 record or evidence from which research subjects might be identified and disclosure of the record or
52 evidence shall be limited to those who have a need to know to carry out the research misconduct
53 proceeding.

54
55 B. Finding of research misconduct under this policy requires that:

- 56 1. There be a significant departure from accepted practices of the relevant research community;
- 57 and
- 58 2. The misconduct be committed intentionally, knowingly, or recklessly; and
- 59 3. The allegation(s) be proven by a preponderance of the evidence.

60
61 C. The University has the burden of proof for making a finding of research misconduct. The destruction,
62 absence of, or failure by the individual against whom allegations are made to provide research records
63 adequately documenting the questioned research is evidence of misconduct only if the University
64 establishes by a preponderance of evidence that:

- 65 1. the individual ~~against whom allegations are made~~ intentionally, knowingly, or recklessly had
66 such records and destroyed them; or
- 67 2. had the opportunity to maintain the records but did not do so; maintained the records and
68 failed to produce them in a timely manner;
- 69 3. and that the individual's conduct constitutes a significant departure from accepted practices of
70 the relevant research community.

71
72 D. The person against whom allegations of research misconduct are made has the burden of proving by a
73 preponderance of evidence, any and all defenses raised. The determination of whether the burden of
74 proof is met shall give due consideration to admissible, credible evidence of honest error or difference of
75 opinion.

76
77 E. The person against whom allegation of research misconduct is made has the burden of going forward
78 with and proving by a preponderance of evidence any mitigating factors that are relevant to a decision to
79 impose administrative actions following a research misconduct proceeding.

80
81 F. The University shall undertake all reasonable and practical efforts, if requested, and appropriate, to
82 restore the reputation of individuals alleged to have engaged in research misconduct but against whom
83 no finding of research misconduct is made.

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85 G. The University shall undertake all reasonable and practical efforts to protect, restore the position and
86 reputation, and to counter potential or actual retaliation against those individuals who, in good faith,
87 make allegations of research misconduct and other participants in part of a research misconduct
88 proceeding.

89
90 H. The University shall take all necessary precautions to ensure that individuals responsible for carrying
91 out any part of the research misconduct proceedings are selected based on scientific expertise that is
92 pertinent to the matter and do not have unresolved personal, professional, or financial conflicts of
93 interest with the individual against whom allegations are made, the individual(s) making the allegation,
94 or witnesses participating in the proceedings. Any conflict, which a reasonable person would consider to
95 demonstrate potential bias, shall disqualify the individual from selection.

96
97 I. Whenever necessary and appropriate to ~~insure~~ ensure a thorough, competent, objective and fair
98 evaluation of all the evidence during an inquiry or investigation, individuals with special expertise will be
99 consulted.

100
101 J. The University will notify the appropriate funding agency, where applicable, of any decision to
102 terminate an inquiry or investigation before completion of the process outlined here or required by law.
103 The notice will include the reasons for such early termination. The procedural requirements of funding
104 agencies do vary, and the investigating body is cautioned to review the current legal requirements at the
105 time of any inquiry or investigation under this policy.
106

107 IV. Responsibility

108
109 A. The University shall be responsible for all of the following actions:

- 110 1. Taking all necessary actions to foster a research environment that promotes research integrity
111 and discourages research misconduct;
- 112 2. Taking all reasonable and practicable steps to ensure the cooperation of those against whom
113 the allegations are directed and other members of the University with research misconduct
114 proceedings, including, but not limited to, their providing information, research records, and
115 evidence;
- 116 3. Cooperating with funding agencies during any research misconduct proceeding or compliance
117 review and provide administration and enforcement of actions imposed by the agency on the
118 University;
- 119 4. Filing the required assurances of compliance and aggregated information on research
120 misconduct proceedings as required by the funding agency;
- 121 5. Establishing and maintaining appropriate policies and procedures for monitoring compliance
122 with the provisions of this policy and upon request, and as appropriate, provide compliance
123 information to funding agencies and members of public, informing University faculty and
124 administrative staff of this policy;
- 125 6. Informing ~~the~~ any research project team members on externally funded projects of the
126 policies and procedures of the funding agency for responding to allegations of research
127 misconduct, and the University's commitment to comply with the funding agency's policies and
128 procedures;
- 129 7. Taking immediate action in accordance with the provisions of this policy as soon as
130 misconduct on the part of employees or individuals within the University's control is suspected
131 or alleged;
- 132 8. Directing the maintenance and custody of and access to documents, evidence, reports,
133 research records, and any other materials generated in the course of research misconduct
134 proceedings;
- 135 9. Notifying the ORI or the appropriate funding agency if it is ascertained at any stage of an
136 inquiry or investigation of a project funded by a specified funding agency that any of the
137 following conditions exist:
 - 138 a. Health or safety of the public is at risk, including an immediate need to protect
139 human or animal subjects,
 - 140 b. Agency resources or interest are threatened,
 - 141 c. Research activities should be suspended,
 - 142 d. There is a reasonable indication of violations of civil or criminal law,
 - 143 e. Federal action is required to protect the interest of those involved in the research
144 misconduct proceedings,
 - 145 f. There is a belief that the research misconduct proceedings may be made public
146 prematurely, so that appropriate steps may be taken to safeguard evidence and protect
147 the rights of those involved,
 - 148 g. There is a belief that the research community or public should be informed.
- 149
150 10. Taking appropriate interim actions at any time during a research misconduct proceeding, to
151 protect public health, federal funds and equipment, and the integrity of the PHS supported
152 research process. The necessary actions will vary according to the circumstances of each case,
153 but examples of actions that may be necessary include delaying the publication of research
154 results, providing for closer supervision of one or more researchers, requiring approvals for
155 actions relating to the research that did not previously require approval, auditing pertinent
156 records, or taking steps to contact other institutions that may be affected by an allegation of

157 research misconduct.

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159 11. Reporting to appropriate federal agencies any proposed settlements, admissions of research
160 misconduct, or institutional findings of misconduct that arise at any stage of a misconduct
161 proceeding involving federally-funded research, including the allegation and inquiry stages.
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163 V. Allegations of Misconduct in Research

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165 A. Any individual who alleges that an act of misconduct in research has occurred or is occurring by an
166 employee of the University or University Auxilliary Research Services Corporation (UARSC) California
167 ~~State University San Marcos Foundation~~ shall disclose such allegations through any means of
168 communication to the Associate Vice President for Research and Graduate Studies (AVPR) and Provost to
169 determine whether the allegation warrants an investigation. Upon receipt of any allegation of
170 misconduct in research or creative activity, the AVPR shall promptly (within 5 working days?) assess the
171 allegation to determine if an inquiry is warranted. An inquiry is warranted if the allegation: (1) meets the
172 definition of research misconduct in section 11[14] of this policy; and (2) is sufficiently credible and specific
173 so that potential evidence of research misconduct may be identified, and (3) for externally funded
174 research it satisfies the external agencies' research misconduct applicability requirements.
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176 Should a student be referred to the Dean of Students instead of going through this process?
177

178 C. ~~B.~~ If the AVPR determines that an inquiry is warranted, they [15] shall immediately prepare a written
179 description of the allegations and notify the individual(s) against whom the allegations are asserted.
180 The notification shall include a copy of the description of the allegations together with a copy, or
181 reference, to this policy statement. In addition the individual(s) against whom the allegations are
182 asserted shall be advised in writing that they have the right to union representation and legal
183 counsel.
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185 Should we attach a copy of the timetable for this policy?

186 VI. The Inquiry

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188 A. Upon determination that an inquiry is warranted the AVPR shall immediately begin an inquiry into the
189 allegations. The purpose of the inquiry is an initial review of the evidence to determine if the criteria for
190 conducting an investigation are met.
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192 B. The AVPR on or before the notification date of the individual(s) against whom allegations are made or
193 the initiation of the inquiry, whichever occurs earlier, shall promptly take all reasonable and practical
194 steps to obtain custody of all the research records and evidence needed to conduct the research
195 misconduct proceedings, inventory the records and evidence, and sequester them in a secure manner,
196 except that where the research record or evidence encompass scientific instruments shared by a number
197 of users, custody may be limited to copies of the data or evidence on such instruments, so long as those
198 copies are substantially equivalent to the evidentiary value of the instruments. The same steps shall be
199 taken regarding the custody of additional research records and evidence discovered during the course of
200 the research misconduct proceeding, including at the inquiry and investigation stages, or if new
201 allegations arise.
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203 C. Within 15 working days of notification of the individual(s) against whom allegations of research
204 misconduct is made, the AVPR and the chair of the Academic Senate shall jointly appoint a panel of three
205 members, with appropriate expertise [16] under provisions of sections 3.8 and 3.9 [17] of this policy, to
206 conduct the inquiry. A minimum of two members of the panel shall be full-time tenured faculty members
207 of the University. Whenever possible at least one committee member shall represent the field or
208 discipline from which allegations of research misconduct is made.
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210 D. Changes to the membership of the inquiry panel shall be made only through joint decision of the AVPR
211 and the Academic Senate Chair.
212

213 E. The inquiry, including submission of the inquiry report and giving the individuals(s) against whom

214 | allegations were asserted a reasonable opportunity (minimum of [18]-10 working days) to comment on it,
215 | shall be completed within 60 calendar days of its initiation unless circumstances clearly warrant a longer
216 | period. If the inquiry takes longer than 60 calendar days to complete, documentation of the reasons for
217 | delay shall be included in the inquiry record.
218 |

219 | F. A written inquiry report shall be prepared that states:

- 220 | 1. The name and position of those against whom allegations of misconduct was asserted;
- 221 | 2. A full description of the allegations of research misconduct
- 222 | 3. The basis for recommending that the alleged actions does or does not warrant an
223 | investigation;
- 224 | 4. Any comments on the report by the person(s) making the allegation and those against whom
225 | the allegations were asserted;
- 226 | 5. Any additional agency requirement for externally funded projects.
227 |

228 | G. An investigation is warranted if there is:

- 229 | 1. a reasonable basis for concluding that the allegation falls within the definition of research
230 | misconduct and
- 231 | 2. preliminary information-gathering and preliminary fact-finding from the inquiry indicates that
232 | the allegation may have substance.
233 |

234 | H. The final inquiry report shall be provided to the AVPR for review, who will make a written
235 | determination of whether an investigation is warranted. If a determination is made that an investigation
236 | is warranted the AVPR shall within 30 calendar days:

- 237 | 1. report the findings to the Associate Vice President for Academic Resources (~~when the~~
238 | ~~respondent is a faculty member~~), appropriate unit administrator [19] (e.g., College Dean), and to
239 | the Provost;
- 240 | 2. provide written notification to the individuals against whom allegations of research
241 | misconduct are raised of the specific allegations to be investigated. The notification shall include
242 | a copy of the inquiry report and include a copy or reference to this policy statement; for
243 | comment within 10 days [10].
- 244 | 3. on a need to know basis, contact the Dean/Director or Unit Head regarding the inquiry results.
245 | For PHS supported activities, within 30 days of finding that an investigation is warranted; the
246 | AVPR shall provide ORI with a written finding and a copy of the inquiry report.
247 |

248 | I. The AVPR may notify those who made the allegations whether the inquiry found that an investigation is
249 | warranted and may provide a copy of the relevant portions of the inquiry report to them.
250 |

251 | J. For externally funded projects the AVPR shall: follow the reporting and notification and disclosure
252 | requirements of the agency and comply with agency requirements for maintenance and transfer of
253 | records to the funding agency.
254 |

255 | VII. Investigation

256 | A. An investigation is the formal development of a factual record and the examination of that record
257 | leading to a decision not to make a finding of research misconduct or to a recommendation for a finding
258 | of research misconduct, which may include a recommendation for other appropriate actions including
259 | administrative actions.
260 |

261 | B. Within 15 working days after the determination that an investigation is warranted the AVPR and the
262 | Chair of the Academic Senate shall jointly appoint a panel of five members, with appropriate expertise
263 | [11] subject to provisions of III. H. and III. I. [12]. of this policy, to conduct the investigation. None of the
264 | members of the inquiry panel are eligible to serve on the investigation panel. A minimum of three
265 | members of the panel shall be full-time tenured faculty members of the University.
266 |

267 | C. Changing the membership of the investigation panel shall be made only through joint decision of the
268 | AVPR and the Academic Senate Chair.
269 |
270 |

271 D. An investigation following inquiry must be undertaken within 30 calendar days of the completion of
272 the inquiry. All aspects of an investigation must be completed within 120 calendar days of beginning it,
273 including conducting the investigation, preparing the report of findings, providing draft report for
274 comments, and incorporation of all comments received. If it becomes apparent that the investigation
275 cannot be completed within 120 calendar days, the reasons for delay shall be documented and included in
276 the final report of the investigation. For externally funded projects, the external agency requirements for
277 requesting extension to investigation period shall be followed.
278

279 E. The individual(s) against whom allegations of misconduct were directed shall be given written notice of
280 any new allegations raised during the investigations within a reasonable time (5 working days) after
281 determining to pursue allegations not addressed in the inquiry or the initial notice of the investigation.
282

283 F. In conducting the investigation, the investigation panel shall:

284 1. make diligent efforts to ensure that the investigation is thorough and sufficiently documented
285 and includes examination of all research records and evidence relevant to reaching a decision on
286 the merits of the allegation;

287
288 2. take reasonable steps to ensure an impartial and unbiased investigation to the maximum
289 extent practical[(113)];

290 ~~3.~~ interview both the individual(s) making the allegation and those against whom the
291 allegations were made and any other available person who has been reasonably identified as
292 having information regarding any relevant aspect of the investigation, providing the recording or
293 transcript to the interviewee for correction, and include the recording or transcript in the record
294 of investigation;

295 ~~4.~~ pursue diligently all significant issues and leads discovered that are determined relevant to
296 the investigation, including any evidence of additional instances of possible research
297 misconduct, and continue the investigation to completion; and

298 ~~5.~~ for externally funded research, comply with all requirements of the supporting agency for
299 conducting research misconduct investigation.
300

301 G. The panel shall notify the individual(s) being investigated sufficiently (minimum of 10 working days) in
302 advance of the scheduled interview date so that the individual(s) may adequately prepare for the
303 interview and arrange for the attendance of legal counsel if desired.
304

305 H. Within 90 calendar days of initiation of the investigation, the draft investigation report should be
306 submitted to the AVPR.
307

308 I. The individual(s) who raised the allegation may be given a copy of the draft investigation report or
309 relevant portions of the report. If a written comment is submitted within 30 calendar days, the comment
310 shall be made part of the final investigation report.
311

312 J. A copy of the draft investigation report shall be provided to the individual(s) being investigated and
313 concurrently a copy of, or supervised access to, the evidence on which the report is based. Any comments
314 by the individual(s) being investigated that are submitted within 30 calendar days following the receipt of
315 the draft investigation report shall be made a part of the final investigation report.
316

317 K. The final investigation report shall:

318 1. describe the nature of the allegations of research misconduct;
319 2. describe the specific allegations of research misconduct considered in the investigation;
320 3. identify and summarize the research records and evidence reviewed, and identify evidence
321 taken into custody but not reviewed. The report shall also describe any relevant records and
322 evidence not taken into custody and explain why;

323 4. provide a finding as to whether research misconduct did or did not occur for each separate
324 allegation of research misconduct identified during the investigation, and if misconduct was
325 found,

326 a. identify it as falsification, fabrication, or plagiarism and whether it was intentional,
327 knowing, or in reckless disregard,

- 328 b. summarize the facts and the analysis supporting the conclusion and consider the
 329 merits of any reasonable explanation, evidence and rebuttal evidence provided by those
 330 against whom the allegations were asserted,
 331 c. identify any external or internal support in conducting the research,
 332 d. identify any publications that need correction or retraction;
 333 e. identify the person(s) responsible for the misconduct,
 334 f. list any current support or known applications or proposals for support that the
 335 person responsible for misconduct has pending with external agencies or internal
 336 university units;
 337 5. include and consider any comments made by those who made the allegations and the persons
 338 against whom allegations were made.
 339

340 L. Copies of the final investigation report shall be provided to the AVPR and the individual(s) against
 341 whom allegations of research misconduct were raised. The AVPR shall review the report to ensure that it
 342 complies with the provisions of this policy.
 343

344 M. The AVPR shall make **recommendations** [114] for corrective measures, if any, and forward the final
 345 investigation report to the Associate Vice President for Academic Resources, the Provost, and the College
 346 Dean/Unit Director. The final decision is to be made by the Provost, President, or President designee or
 347 Dean of Students if the respondent is a student?
 348

349 N. For externally funded projects, the external agency requirements for the maintenance and provision of
 350 relevant research records and records of the University's research misconduct proceedings, including
 351 results of all interviews and the transcripts or recordings of such interviews shall be followed.
 352

353 VIII. Cooperation with ORI
 354

355 A. The University shall cooperate with ORI during its oversight review under 42 CFR 93.400 et seq. or any
 356 subsequent administrative hearings or appeals under 42 CFR 93.500 et seq. with respect to research
 357 integrity and misconduct issues related to PHS supported activities. This includes providing all research
 358 records and evidence under the University's control, custody, or possession and access to all persons
 359 within its authority necessary to develop a complete record of relevant evidence.
 360
 361
 362

1 st Reading Comment	Action Taken
Does policy cover student employees (line 18)?	Yes, student employees added to line 18.
Is 'preponderance of evidence' language necessary (lines 33/51)?	Yes, followed template and guidelines recommended in the federal regulations 42 CFR 93.219. No action taken.
Are corrective measures too punitive (line 318)?	Perhaps. Modified to read: recommendations for appropriate or corrective measures

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1st reading – PAC: Program Review

Comparison of Current and Revised Program Review Procedures

OLD VERSION	NEW VERSION
There was no policy as such, document outlined philosophy and procedure.	The new policy with separate guidelines providing procedure and specific instructions.
While student learning outcomes were part of the items to be addressed during program reviews there was no specific reporting of assessment.	Accreditation bodies and the CSU have placed increasing focus on assessment of student learning and reporting. Therefore, assessment reports are incorporated into the program review.
Repeated every 5 years	Assessment is on going. Program review cycle is 5 or 7 years.
Comprehensive review. Department addresses 9 topics, one of which is student learning outcomes. Others are design of degree program, student readiness, graduates, advising, enrollments, pedagogy and instruction, resources, and extracurricular activities.	Content of review begins with reflection on achieving educational objectives (SLO's) on student learning outcomes by examining annual assessment data, followed by a section on developing and allocating resources and concluding with the selection of not more than two additional themes/special interests.
Data Notebook required departmental action	Data Notebook contents identified by department, located by IPA and OPAA Faculty Fellow and provided to the department.
Lack of guidance on structure of narrative.	Includes instructions for report structure and content. Also a model outline is provided (sections VI and VII).
PAC and External Reviewer roles unclear	Clarifies roles of PAC, External Reviewers, and others (sections III).
Little or no specific funding or support.	Support from Learning Outcomes Assessment Fellow on PSLOs and from OPAA Faculty Fellow on data notebook development. Provides resources for faculty conducting annual assessment and self study.
Usually one External Reviewer	Provides for 2 External Reviewers, whenever possible. Includes specific information on selection, visit, and expectations.
Planning report required	Part of narrative includes discussing future goals.
Few specifics on masters programs	Graduate programs included throughout.
Senate receives end of year report.	Senate office receives end-of-year report.
Includes mention of system for ad-hoc committee to review viability of program	Includes recommendations for program continuation comprised of 3 levels of recommendations.
Planning report has only mention of MOU but specifics were vague. The program review report became "baseline" for next PEP.	Includes final meeting and MOU for future goals/developmental plan (section III).
	3/07/11

5
6

7 Definition: A policy outlining the responsibilities for and requirements of the CSUSM academic program
8 review, evaluation, and planning process.

9 Authority: Chancellor's Office Memorandum AP 71-32, "Performance Review of Existing Degree Major
10 Programs"

11 Scope: All academic degree major programs.
12

13 I. Preamble

- 14 A. Program Review at the California State University originated with the Chancellor's Office
15 memorandum AP 71-32, "Performance Review of Existing Degree Major Programs," which asks
16 each campus to "establish a formal performance review procedure for all existing degree
17 programs on campus in order to assess periodically both the quantitative and qualitative viability
18 of each undergraduate and graduate program in the total context of offerings." A summary of
19 the program review is sent to the Chancellor's Office by the Associate Vice President of
20 Planning, Accreditation, and Assessment (AVP-PAA).
21 B. The intention of Program Review is to open and maintain dialogue among the program faculty and
22 between all of the parties (the academic unit and various administrative offices, etc.) whose
23 cooperation is necessary for the delivery of a high-quality academic degree program.
24 C. In adopting this policy, the Academic Senate acknowledges the serious investments in time and
25 effort involved and stands committed to making assessment and sustaining program quality as
26 important aspects of the campus culture.
27

28 II. Definition of terms and abbreviations

- 29 A. Academic unit
30 1. Refers to the department, program, school, or college that oversees the curriculum for a
31 degree program.
32 B. Academic degree programs
33 1. Refers specifically to baccalaureate, master's, and doctoral degree programs.
34 2. Program review will focus on both the academic unit's capacity to deliver the program as
35 well as the educational effectiveness of the degree program.
36 a. When colleges/schools or departments manage more than one academic degree,
37 each degree program shall undergo a separate review.
38 b. It is expected, however, that major sections of the self-study report may be
39 duplicated when more than one degree program is reviewed in the same
40 department or program.
41

42 III. Principles:

- 43 A. The program review process will be central to academic planning, budget, and decisions about
44 allocation of resources.
45 B. The program review process will not duplicate, but rather will build upon, other campus-wide
46 processes or reporting activities such as annual assessment reports, annual departmental
47 reports, and strategic planning documents.
48 C. Program review helps to identify strengths, challenges, opportunities for improvement, and
49 provides a chance to plan for the future. It is only useful to the extent that it is a systematic,
50 developmental, ongoing process of inquiry conducted by academic programs that includes data
51 from annual assessments.
52 D. The value of program review derives, in part, from the use of results in programmatic, collegiate
53 and institutional planning, and in resource allocation decisions to meet program needs and help
54 program to improve, especially where correctable weaknesses can be identified.
55 E. One outcome of the review process is a plan specifying goals and strategies for program
56 improvement and student learning assessment. This represents the formative, developmental,
57 and planning phase of the process, once the summative stage, in the form of various reviewers'
58 recommendations, has passed. For the next cycle of review, this plan becomes an important
59 point of focus. In time, as current reviews build upon their predecessors, program review,
60 learning assessment, and curriculum development should become a significant and altogether
61 routine aspect of life at CSUSM.
62 F. Recognizing that program review is labor-intensive and time-consuming, this Academic Senate
63 policy aims to ensure that the process operates under a realistic timeline and that it is sensitive

64 to the effort required. In order to fulfill this commitment, resources must be provided for
65 annual assessment projects, the development of the self study, and the external reviewers. The
66 Provost's office will provide resources for annual assessment projects, external reviewers, and
67 the resources to support faculty in the development of the self-study. Should budget constraints
68 impact support for program review processes, appropriate adjustments will be made in program
69 review expectations and processes.
70

71 IV. Program Review Responsibility

- 72 A. Department/Program (hereafter referred to as department)
- 73 1. The responsibility for carrying out the program review process lies with faculty that deliver
74 the curriculum for the particular degree program, and they are assisted in this endeavor
75 by CSUSM staff and administration.
 - 76 2. The department will conduct a candid self-study examining departmental goals and
77 accomplishments (including progress on accomplishing goals set forth in the previous
78 review's Memorandum of Understanding (MOU), and reviewing the results of annual
79 assessment of student learning outcomes and suggestions from Office of Planning,
80 Accreditation, and Assessment (OPAA) in response to these reports.
 - 81 a. The self-study will include discussion of the student learning outcomes and
82 assessments, as well as the program's currency, capacity, and academic integrity as
83 outlined in the program review procedures.
 - 84 b. For specific self-study guidelines, see the *CSUSM Guidelines for Program Review*
- 85 B. College Deans²
- 86 1. Deans or their designees are responsible for working with the OPAA to assure the timely
87 completion of the program review.
 - 88 2. Deans review the self-study for completeness and accuracy prior to the external review
89 visit.
 - 90 3. Deans provide evaluative comments on the self-study after receipt of the external
91 reviewer report.
 - 92 4. Deans participate in the development of the MOU.
- 93 C. The Program Assessment Committee of Academic Senate (PAC)
- 94 The PAC is responsible for overseeing the program review process, for the final response to the
95 department, including recommendations for five or seven-year review cycles, for
96 recommendations regarding program continuation, for meeting with those who develop the
97 MOU, and for reporting to the Academic Senate.
- 98 D. Institutional Planning and Assessment (IPA)
- 99 1. IPA is responsible for providing timely and accurate data to each program undergoing
100 review.
 - 101 2. IPA is available to provide support and expertise for programs that wish to conduct
102 surveys for data collection purposes.
- 103 E. Administrative Support
- 104 1. The Office of Academic Planning and Accreditation (OPAA) provides administrative
105 support for the entire process. OPAA is also responsible for reporting the results of
106 program review to the Chancellor's Office.
 - 107 2. The AVP-PAA will confer with the College Deans and with the Dean of Graduate Studies
108 (DGS) for reviews of graduate programs.
- 109
- 110 F. Provost
- 111 1. As the Chief Academic Officer, the Provost is ultimately responsible for the entire
112 program review process and reviews and responds to all reports.

114 V. Review Cycles

- 115 A. The program review process at CSUSM runs on a five or seven year cycle.
- 116 B. The schedule for program review is published in the Academic Master Plan.

² The term "College Deans" also refers to administrative equivalents, such as Director of a school.

- 117 C. Generally, reviews of graduate programs will be scheduled at the same time as the review of the
 118 undergraduate program(s) within the same discipline. Departments may submit a request to the
 119 PAC, OPAA, and DGS to separate undergraduate and graduate reviews.
 120 D. For programs that undergo accreditation, care will be taken to coordinate program review with
 121 accreditation cycles for the discipline (See Section VI of this policy).
 122 E. In the case of new programs, a developmental period of up to five years will be allowed before
 123 the first program review.
 124
- 125 VI. Periodic Review of Accredited Programs
 126 A. Any currently accredited academic program may request to substitute the accreditation report
 127 for the self study and external review. This request is made to the OPAA.
 128 B. Documents prepared for accreditation, visits from the accreditation body, and reports from the
 129 accreditation body will normally be accepted as satisfying components of the self-study report in
 130 whole or in part if the accreditation report includes a discussion of assessment and student
 131 learning outcomes.
 132 C. Substitution of an accreditation report for a program review will only be permitted if annual
 133 assessment plans and reports have been submitted by the program during the period prior to
 134 the accreditation process.
- 135 VII. External Review
 136 A. Except for unusual situations approved by the AVP-PAA, the DGS (for graduate programs only)
 137 and the PAC, external review will be part of all program reviews.
 138 B. Sufficient funds to cover the expense of the external reviews will be included in the budget of the
 139 University.
 140 C. For specific guidelines, see the *CSUSM Guidelines for Program Review*.
 141
- 142 VIII. Concluding the Program Review Process
 143 A. The Chancellor's Office receives a summary statement of the assessment section of the self-
 144 study, including information about how assessment results have been used to improve the
 145 academic degree program.
 146 B. The actual program review reports remain on campus in the OPAA, online as part of the
 147 Program Portfolios, and are the foundation for the next program review.
 148 C. After the faculty of the academic program, the College Dean, and the Provost (or designee),
 149 have had an opportunity to study all reports and recommendations, representatives of
 150 these three areas and the chair of PAC will meet to discuss recommendations and agree on
 151 actions to be taken.
 152 1. Based on this conversation, the AVP-PAA will draft a Memorandum of Understanding
 153 (MOU) that all parties will sign, which will be in effect until the completion of the next
 154 review cycle. The MOU is an opportunity for all to agree on a set of desired developmental
 155 goals, subject to a corresponding agreement about necessary resources and their
 156 availability.
 157 2. This MOU will be used in future planning, budget, and resource allocation processes.
 158 3. Where consensus cannot be achieved, as determined by the AVP-PAA the parties will file
 159 separate memoranda outlining their difference in views. These differences will be
 160 reviewed
 161 by the Senate Chair or his/her designee and the Provost or his/her designee who will work
 162 with the involved parties until consensus is reached.
 163 4. It is understood that College Deans will seek advice related to the MOU from appropriate
 164 college governance committees.
 165 5. For specific guidelines, see the *CSUSM Guidelines for Program Review*.
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Guidelines for Program Review

California State University San Marcos Implementing Academic Senate Policy

Prepared by the
Program Assessment Committee

March 2011

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GUIDELINES FOR PROGRAM REVIEW³

214

215

216 I. The Purpose of Program Review

217 At California State University, San Marcos (CSUSM), program review provides an opportunity
218 to assess the educational effectiveness of undergraduate and graduate degree programs for
219 the purpose of program planning and resource allocation. Program reviews are conducted in a
220 climate of faculty participation and self study designed to enhance the quality of teaching and
221 learning. Toward this goal, program reviews include a thorough process of data collection
222 and analysis that enables faculty to see how pedagogical goals are pursued and achieved
223 using the resources available.

224

225 One focus of program review is on student learning outcomes: their clear articulation in
226 program documents, their alignment with University mission goals, and their assessment
227 through annual processes of data collection, analysis, and review. Program reviews also
228 provide a basis for program planning, with the review process supplying documentation
229 regarding the program's current status, including its enrollment trends, support
230 services, efficient use of instructional and capital resources, faculty productivity and
231 accomplishments, and program goals for the future. The value of program review derives, in
232 part, from the use of results in programmatic, collegiate and institutional planning, and in
233 resource allocation decisions to meet program needs and help programs to improve,
234 especially where correctable weaknesses can be identified and addressed.

235

236 The responsibility for carrying out program review lies primarily with the program faculty
237 under the leadership of the Department Chair/Program Director (DC/PD) or his/her appointed
238 designee, supported by the Dean and assisted in the review process by the Office of Planning,
239 Accreditation, and Assessment (OPAA) and, if appropriate, the Dean of Graduate Studies
240 (DGS). The intention of the program review process is to open and maintain dialogue among
241 the program faculty and between all of the parties (the academic unit and various
242 administrative offices, etc.) whose cooperation is necessary for the delivery of a high-quality
243 academic degree program. From an institutional vantage point, program review is designed
244 to provide data and recommendations that will support effective program change,
245 institutional planning, and decisions regarding the allocation of resources.

246

247 II. Context for Program Review

248

249 Program reviews are prepared in the context of several CSU and campus policies and
250 commitments relating to program quality and student learning as well as external criteria of
251 evaluation, most centrally the standards provided by the Western Association of Schools and
252 Colleges (WASC). Those involved in the program review should be familiar with these policies
253 in order to align their efforts with key University and CSU priorities.

254

- 255 ● **CSU Policy on Program Reviews**

256

257 In 1971, the CSU Board of Trustees adopted policy requiring that each campus review
258 every academic program on a regular basis (Chancellor's Office memorandum AP 71-32)
259 for the purpose of determining program viability. CSUSM has separate policies and
procedures for program discontinuance in which program review may play a part

³ This document is based on guidelines for program review adopted by CSU Channel Islands. We acknowledge the assistance of CSUCI in developing these guidelines for implementing the CSUSM policy and guidelines for program review.

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(www.csusm.edu/policies/active/documents/apd.html). The criteria and procedure for academic program discontinuance is outlined in the CSUSM policy on academic discontinuance, and readers are referred to that document for information about it.

The frequency of program review is subject to some campus discretion with the intent of allowing campuses to align their review schedules with WASC accreditation, program specific, and professional accreditation activities. With increased focus within the CSU on learning outcomes assessment across a wide range of reporting areas, including the CSU Cornerstones/Accountability reporting and WASC, campuses are encouraged by CSU practice to make annual assessment an important part of the program review process.

Initially, comprehensive summaries of campus program reviews were provided annually for inclusion in the annual March meeting of the Board of Trustees. More recently, however, the Chancellor's Office, in consultation with the Academic Council and the statewide Academic Senate, has decreased the workload requirement on campuses and allowed for greater campus flexibility in program review. The result is a less comprehensive reporting requirement. Today, each CSU reports annually in January on its program review activity and degree changes that have resulted from those reviews.

- **WASC Standards for Accreditation**

WASC serves as CSUSM's regional accrediting agency. Those participating in the program review process should be familiar with WASC standards for accreditation. In focusing on educational effectiveness, WASC asks each institution to:

- **Articulate a Collective Vision of Educational Attainment** - Each institution sets goals and obtains results for student learning at both the institutional and program level that are clearly stated, that are appropriate for the type and level of the degree offered, and that are adequately assessed to ascertain mastery.
- **Organize for Learning** – Each institution should align appropriate institutional assets with the goal of producing high levels of student learning that are consistent with the mission of the institution, including curriculum, faculty recruitment, faculty development and scholarship, organizational structures, information resources, student services and co-curricular activities, and resources.
- **Become a Learning Institution**--Each institution will develop systems to assess its own performance and to use information to improve student learning over time. These systems reinforce a climate of inquiry and are based on standards of evidence that prominently feature educational results.

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- **CSUSM Mission Statement**

Placing students at the center of CSUSM’s mission statement provides a focus for campus instruction.

California State University San Marcos focuses on the student as an active participant in the learning process. Students work closely with a faculty whose commitment to sustained excellence in teaching, research, and community partnership enhances student learning. The university offers rigorous undergraduate and graduate programs distinguished by exemplary teaching, innovative curricula, and the application of new technologies. CSUSM provides a range of services that respond to the needs of a student body with diverse backgrounds, expanding student access to an excellent and affordable education. As a public university, CSUSM grounds its mission in the public trust, alignment with regional needs, and sustained enrichment of the intellectual, civic, economic, and cultural life of our region and state.
(<http://www.csusm.edu/about/facts/mission.html>)

- **CSUSM Senate Policy [TO BE COMPLETED WHEN POLICY IS APPROVED]**

The CSUSM Academic Senate approved its most recent "Policy for Review of Academic Programs" in ??? that implements CSU policy on program review. The CSUSM policy states that "(p)rogram review helps to identify strengths, weaknesses, opportunities for improvement, and provides a chance to plan for the future. It is only useful to the extent that it is a systematic, developmental, and ongoing process of inquiry conducted by academic programs."

As outlined in CSUSM policy, program review will include each of the following components:

- a) an academic program self-study and recommendations;
- b) an external review and recommendations; and
- c) University review and decision-making

The policy also calls for academic programs to be reviewed on a five or seven-year cycle and charges Deans or their designees with responsibility for working with the OPAA to ensure the timely completion of the program review. (CSUSM Academic Senate Policy ??-??)

- **Annual Assessment Plans**

To facilitate program review and to meet WASC requirements, since AY 05-06, all departments offering majors for undergraduate degrees and master’s programs have been asked to report annually on assessment related to one or more of the program-level student learning outcomes. At the conclusion of each academic year, departments are asked to report on the assessment activities used to measure student learning, the results of the assessments, and how these assessment findings are leading to changes at either the course or program level in order to improve student learning. In turn, the OPAA provides feedback on these annual reports in the form of suggestions to the program which are meant to be formative and advisory only. OPAA provides funding and resources to support assessment projects and will continue to do so, pending future budget constraints, in which case, appropriate adjustments will be made in assessment expectations and processes.

III. Elements of Program Review and Responsibilities of Participants

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A. Overview

There are a number of major components to the program review and responsibilities to be carried out by its participants that include: preparing for the review, conducting the self study, the external review, program response to the external review, review and recommendations from the Dean and Provost, review and recommendations from the Program Assessment Committee (PAC), developing a Memorandum of Understanding (MOU), and implementing recommendations.

The OPAA provides institutional support in the program review process. Its role is to assist the program in initiating and conducting its self study, to ensure that the various parties are aware of and follow the review calendar, to assist in the dissemination of documents, to provide budget resources needed for the review, and to serve as a repository for materials and reports.

B. Preparing for the Review

The Associate Vice President of Planning, Accreditation, and Assessment (AVP-PAA) will inform the Department Chairs/Program Directors (DC/PD), the College Deans, and Provost about which programs will begin the review process. In the case of graduate program reviews, the AVP-PAA will consult with the Dean of Graduate Studies (DGS).

Each DC/PD will appoint a program review coordinator or committee that will take primary responsibility for carrying out the self study. Programs may include community or advisory board members, representatives from community colleges, or CSUSM faculty and staff from outside the program on the self-study team.

The OPAA will arrange an initial planning meeting to orient all of those involved in the review process. Those attending will include the appropriate college Deans or school Directors, Chairs of programs being reviewed, the AVP-PAA, the faculty coordinating the program reviews, the director of Institutional Planning and Assessment (IPA), and the chair of PAC. The OPAA will serve as the liaison with IPA in providing the contents of the data notebook, both common data for all programs as well as data requested by the program that is unique to that program.

C. Conducting the Self Study

The program faculty appointed by the DC/PD will conduct a self study and prepare a self-study report in consultation with the college Dean and the AVP-PAA (see section VI for elements of the self study).

D. Conducting the External Review

1. Tasks and Responsibilities

The purpose of external review is to provide a broad, independent perspective on the program. Except for unusual situations approved by the AVP-PAA, the DGS (for graduate programs only), and PAC, external review will be part of all program reviews. The main tasks associated with the external review are: selection of the reviewers, preparation and hosting of the site visit, and response to the reviewers' completed report. The OPAA takes the lead on matters of budgeting for and logistics of the external review visit and for receipt and distribution of the external review to participants in the review process. The faculty member coordinating the program self study serves as a liaison with the OPAA. PAC will receive the self study and meet with the external reviewers.

406 It is expected that two reviewers will conduct the external review. These evaluators will come
407 together to spend two days on campus meeting with students, staff, faculty, administrators,
408 and the PAC and then prepare a joint written report with comments and recommendations
409 based on their review of the self-study report and these on-campus meetings.
410

411 **2. Selecting External Reviewers**

412 A typical external review is by one reviewer from outside the University, often one from
413 another CSU, and one reviewer from a non-CSU institution. The faculty of the academic
414 program under review shall forward to the AVP-PAA the names of at least four individuals
415 they wish to have considered as external reviewers. The OPAA will contact these potential
416 reviewers and ask them if they are available. In the event that the faculty-generated list does
417 not provide a sufficiently large pool of available reviewers, the OPAA, and, if appropriate, the
418 DGS, will consult with the program in order to jointly generate a list of other potential
419 reviewers. Potential reviewers will be asked for their curriculum vitae, personal/professional
420 relationships with faculty at CSUSM, previous experience with academic program review and
421 assessment, and any other relevant information. Selection of the reviewers is based on the
422 following criteria: demonstrated achievements in the field, affiliation with an accredited
423 academic program appropriate to the program being reviewed, and no conflict-of-interest.
424 The AVP-PAA (or DGS for graduate programs only), after consultation with the DC/PD, college
425 Dean, and the PAC, will select the two external reviewers.
426

427 **3. External Review Budget and Visit Arrangements**

428 After selection of the external reviewers, the OPAA makes arrangements for the site visit and
429 covers all expenses related to the external review.
430

431 **4. Site Visit**

432 The external review will generally be conducted in the fall semester of Year Two of the self
433 study. At least two weeks prior to their visit, the OPAA will provide the external reviewers
434 with copies of all appropriate materials including the self-study report, the PAC memorandum
435 and MOU from the previous review, and these guidelines describing CSUSM's program review
436 process. Other information will be available upon request.
437

438 During a typical campus visit, the external reviewers will meet with the AVP-PAA, the PAC, the
439 DGS (for graduate programs only), the Dean and Associate Dean(s) of the College, tenure-
440 track and lecturer faculty, students at all levels of the program (for informal conversation),
441 the liaison librarian, program staff, and other appropriate personnel. Reviewers should have
442 an opportunity to tour relevant facilities used by the program, including dedicated
443 classrooms, labs, studios, and performance spaces.
444

445 Time should be set aside on the second day of the site visit for the reviewers to meet on their
446 own to begin to prepare their report. Reviewers will conclude the second day of the campus
447 visit by meeting with the program faculty at which time the reviewers have an opportunity to
448 clarify any issues or questions they have about the program and report orally on their
449 preliminary findings and recommendations. This meeting is followed by an exit meeting with
450 the Provost.
451

452 **5. External Reviewers' Report**

453 In conducting their review, the external reviewers are requested to bear in mind the campus
454 Mission, Vision, and Values Statements (<http://www.csusm.edu/about/facts/mission.html>)
455 and corresponding statements for colleges. The reviewers' report is part of a process

456 intended to help guide future decisions about the program under review and should address
457 the issues most important to this planning process. Concrete suggestions for improvement
458 are, therefore, welcome.

459

460 To be of the greatest use to the program under review, the text of the External Review Report
461 should draw upon the self-study report and information gathered during the site visit to
462 address the following questions:

463

- 464 • **Educational Effectiveness:** Is the program achieving its educational objectives through
465 teaching and learning, scholarship and creative activity, and support for student learning?
- 466 • **Capacity:** Does the program have the resources to deliver the academic program in a
467 quality way?

468

469 In addition, reviewers may offer other recommendations based on their independent review
470 of the self study as well as their discussions with faculty, students, administrators, and staff.

471

472 **E. Responses by the Program, Dean, and Provost**

473

474 **1. Response by Program**

475 The DC/PD prepares a program response to the external reviewers' report.

476

477 **2. Responses by the Dean and Provost**

478 The Dean and Provost each prepare a written response addressing the program review
479 package (program self study, external reviewers' report, and program response to the
480 external reviewers' report). This response should include more than a summary of the
481 information contained in the program review package, as these responses will be used in the
482 development of the MOU (see description below).

483

484 **F. Review by Program Assessment Committee (PAC)**

485

486 **1. Responsibilities of the PAC**

487 The PAC is a standing committee of Academic Senate. The PAC will:

488

- 489 • meet with the external reviewers after reviewing the program self study;
- 490 • provide independent recommendations after reviewing all relevant documents, including
491 length of program review cycle, to the Academic Senate, program, Dean, and Provost;
492 and
- 493 • participate in the development of the MOU.

494

495 **2. Procedures Followed by PAC**

496 Members of the PAC review the program's self-study report, external reviewers' report,
497 response to the external reviewers' report by the DC/PD, and response to the program review
498 package by the Dean and Provost. After discussing the recommendations and issues raised
499 and addressed in the reports and meetings, PAC makes its own evaluation regarding these
500 recommendations. In terms of format, PAC will provide an executive summary of the entire
501 program review package as well as its own recommendations.

502

503 In addition, based on the review of all material received, PAC will make an overall
504 recommendation regarding the program. These recommendations are based on the following
505 criteria:

506

- 507 • program adherence to the terms of the previous MOU;
- 508 • the degree to which the annual assessments have generated useful data and whether
- 509 assessment results have been used to make appropriate changes;
- 510 • the strengths and challenges identified by the review of educational effectiveness and
- 511 capacity; and
- 512 • the degree to which the five-year plan explicitly and appropriately addresses program
- 513 challenges and enhances or preserves program strengths.

514
515 The PAC will make one of three possible recommendations based on the above criteria:

- 516
- 517 • **Recommendation to Continue a Program with Notation of Exceptional Quality:**
- 518 Approval is recommended without reservation and with a notation of specific areas of
- 519 program promise and excellence. These programs will be recommended for a seven-year
- 520 review cycle.
- 521
- 522 • **Recommendation to Continue a Program of Quality and Promise:** Program approval is
- 523 recommended with identification of specific areas that need to be further developed and
- 524 a notation of specific areas of achievement. These programs will be recommended for a
- 525 five-year review cycle.
- 526
- 527 • **Recommendation of Conditional Continuation:** Conditional approval is recommended
- 528 with identification of specific areas requiring significant improvement and a reasonable
- 529 period of time for making these improvements. These programs will be placed on a five-
- 530 year review cycle with an interim report to be delivered to the AVP-PAA in three years.
- 531 The contents of the interim report will address the issues raised in the previous review.
- 532

533 Based on the interim report, the PAC will determine whether or not the issues raised in the

534 previous review have been adequately addressed. If these issues have been adequately

535 addressed, the program will continue on the five-year program review cycle. If there continue

536 to be questions about whether or not the program provides an appropriate academic

537 experience for students, and if there is insufficient evidence that deficiencies identified in the

538 previous review have been corrected, the PAC may recommend program discontinuation,

539 following the procedures found in the Academic Senate policy on academic discontinuance.

540

541

542 **G. University Review, Decision-Making, and Action Plan**

543 Since the intended outcome of program review is to provide the opportunity to assess a

544 program's educational effectiveness and to provide the basis for program planning and

545 resource allocation, it is especially important that the review process result in a meaningful

546 action plan that is endorsed by all the parties involved in the review. The program review's

547 reports and recommendations serve as a foundation for the program faculty and University

548 administrators to clarify, endorse, and support program goals for the future.

549

550 To accomplish this end, and as provided for in Senate Policy, after the faculty of the academic

551 program, the Dean, and the division of Academic Affairs, and the PAC have had an

552 opportunity to study all reports and recommendations, representatives of these areas will

553 meet to discuss recommendations and agree on actions to be taken. The AVP-PAA will

554 convene and facilitate this meeting. Based on this conversation, the AVP-PAA will draft a

555 Memorandum of Understanding (MOU) that will be signed by a program faculty

556 representative on behalf of the faculty, the Dean or designee, the Provost's designee, and the

557 chair of PAC. This MOU will be in effect until the completion of the next review cycle. Where

558 consensus cannot be achieved, as determined by the AVP-PAA, the parties will file separate
559 memoranda outlining their difference in views.” These differences will be reviewed by the
560 Senate Chair or his/her designee and the Provost or his/her designee who will work with the
561 involved parties until consensus is reached.

562
563 The MOU, which should be based on Section Five of the self-study report and the various
564 levels of review, becomes the degree program's action plan for the next review cycle. The
565 degree program may want to use this action plan to guide its annual assessments over the
566 next review cycle. Program faculty should make every reasonable effort, as resources permit,
567 to realize the improvements outlined in the MOU. Academic Affairs should work with the
568 program to ensure that resources are provided, whenever possible, for the continuous
569 improvement of the academic program.

570
571 It is expected that the MOU will be used by the Provost, the College Deans, and departments
572 as a vital component for strategic planning discussions, as well as form an important element
573 for the annual departmental reports to the Dean, annual assessment reports, Academic
574 Recruitment Plans, and decision making by college hiring and academic planning committees.
575 As stated in the Program Review Policy, the MOU represents the formative, developmental,
576 and planning phase of the process, once the summative stage, in the form of various
577 reviewers’ recommendations, has passed. It also provides an opportunity for all to agree on
578 a desired set of developmental goals, subject to corresponding agreement about necessary
579 resources and their availability.

580
581 **H. Responsibility for Documentation and Reporting**
582 The reports generated by the program review process will be housed in the academic
583 program and in the OPAA. As part of its annual report, the AVP-PAA will notify the Chair of the
584 Academic Senate and the Provost that the program review has been successfully concluded.
585 The AVP-PAA will also notify the CSU Chancellor’s Office each January, through the Office of
586 the President, of all program reviews concluded during the academic year, as required by CSU
587 policy.

588
589 **IV. The Program Review Process and Timeline**

590
591 **A. Overview**
592 Given the data collection, deliberation, and writing needed for a successful review, most
593 reviews will be conducted over a two-year period, with the timeline included in these
594 guidelines serving as a model (see *Table 1: Program Review Timeline* which outlines the
595 program review timeline and sequence and *Figure 1: Program Review Flow Chart* for steps in
596 the process).

597
598 **B. Preparing for the Review**
599 In the spring semester of the year prior to the review year, the AVP-PAA will inform the
600 Department Chairs/Program Directors (DC/PD), the College Deans, and Provost about which
601 programs will begin the review process the following fall. In the case of graduate program
602 reviews, the AVP-PAA will consult with the Dean of Graduate Studies (DGS). The OPAA will
603 arrange an initial planning meeting to orient all of those involved in the review process during
604 the next cycle.

605
606 The data notebook provided by IPA in collaboration with OPAA will be available by the
607 beginning of the fall semester (see Appendix A for a list of the data provided in the notebook).

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C. Conducting the Self Study

During the fall semester, the program faculty appointed by the DC/PD will conduct a self study and prepare a self-study report in consultation with the college Dean and the AVP-PAA. The programs may wish to identify and gather information pertinent to the evaluation of their academic programs and to support later recommendations.

No later than March of the spring semester, the draft of the self-study report is finalized and forwarded electronically by the DC/PD to the College Dean and the AVP-PAA. Comments on the accuracy of the report are made as needed by the Dean upon completion of the self-study report, and by May, the Dean signs the cover sheet indicating that the self-study report is ready for external review. At this point, the AVP-PAA will distribute the self-study report to the Dean of the Library and the Dean of IITS. The Dean of the Library and the Dean of IITS may forward a response to the AVP-AVPA which will become part of the self-study package.

D. Conducting the External Review

During the fall semester of Year Two of the program review, the external reviewers come to the campus and submit their report to the AVP-PAA no later than **three** weeks after their visit. The AVP-PAA will forward the report to the program faculty, the college Dean, and the Provost.

E. Responses by the Program and College Dean

1. Department/Program Response: Upon receipt of the external reviewers' report, the DC/PD prepares a program response to the report that it forwards to the AVP-PAA.

2. Dean's Response: The AVP-PAA forwards the entire program review package, including the self study, the external reviewers' report, and the program response to the external reviewers' report to the Dean. Prior to the beginning of the spring semester of Year Two of the review, the Dean prepares a written response addressing the program review package.

F. Review by the Program Assessment Committee (PAC)

The AVP-PAA forwards the program self-study, the external reviewers' report, the program's response to the external reviewers' report, and responses to the program review by the College Dean to the PAC. Following receipt of the program review package, the PAC meets to review the information collected and may choose to meet with the DC/PD, the College Dean, or any others that the Committee wishes to be present to discuss questions or issues that are raised by the report and responses to it. The PAC then prepares a report that contains a summary of findings from the program review package and its own recommendations to the program which it forwards to the AVP-PAA for distribution to the DC/PD, Dean, and Provost.

G. University Review, Decision Making, and Action Plan

By the end of the spring semester of the second year of the review, representatives of the program faculty, Dean, Provost/designee, and the PAC meet to discuss the recommendations contained in the program review and frame an agreement on actions to be taken. As provided for in the Senate's policy, this agreement "will be embodied in a Memorandum of Understanding (MOU) which will be in effect until the completion of the next review cycle."

661
662
663

Program Review Timeline

Preparation Activity: (Activity during the spring semester prior to start of program review):

- AVP-PAA gives formal notification to programs to initiate program review the following fall.
- Programs begin preparation for review:
 - Identify data needs
 - Appoint self-study coordinator and/or committee
 - Continue course and program assessment projects
- OPAA sets up group orientation meeting
 - Dean, AVP-PAA and, in the case of graduate programs, DGS, and the chair of PAC review procedures with DC/PD and appropriate faculty
 - IPA provides data notebooks

664

Year One – Self Study

FALL SEMESTER	ACTIVITY
September - December	<ul style="list-style-type: none"> • Program collects and assembles data for self study • Program writes self-study report
SPRING SEMESTER	
January-March	<ul style="list-style-type: none"> • Program finalizes and submits self-study report
April	<ul style="list-style-type: none"> • Self-study report submitted to Dean • Program submits names of prospective external reviewers
May	<ul style="list-style-type: none"> • Dean submits comments on completeness of the self-study report • AVP-PAA and, in the case of graduate programs, DGS approve names of external reviewers • Dean of Library and Dean of IITS receive self-study report and may submit responses

665

666

Year Two – Self Study

FALL SEMESTER	ACTIVITY
September/October	<ul style="list-style-type: none"> • PAC receives self-study report • External Review Team visits campus
October/November	<ul style="list-style-type: none"> • External Reviewers submit written report
November-January	<ul style="list-style-type: none"> • DC/PD responds to external reviewers' report • Dean responds to the program review package
SPRING SEMESTER	
February	<ul style="list-style-type: none"> • PAC reviews program self study, external review, and Dean's responses
March-April	<ul style="list-style-type: none"> • PAC sends its report and recommendations to the AVP_PAA for distribution to DC/PD, Dean, and Provost
April	<ul style="list-style-type: none"> • Provost responds to the program review package in preparation for the MOU process
April/May	<ul style="list-style-type: none"> • DC/PD, Dean, Provost, and PAC meet to identify priorities and action plan for program improvement, and develop MOU

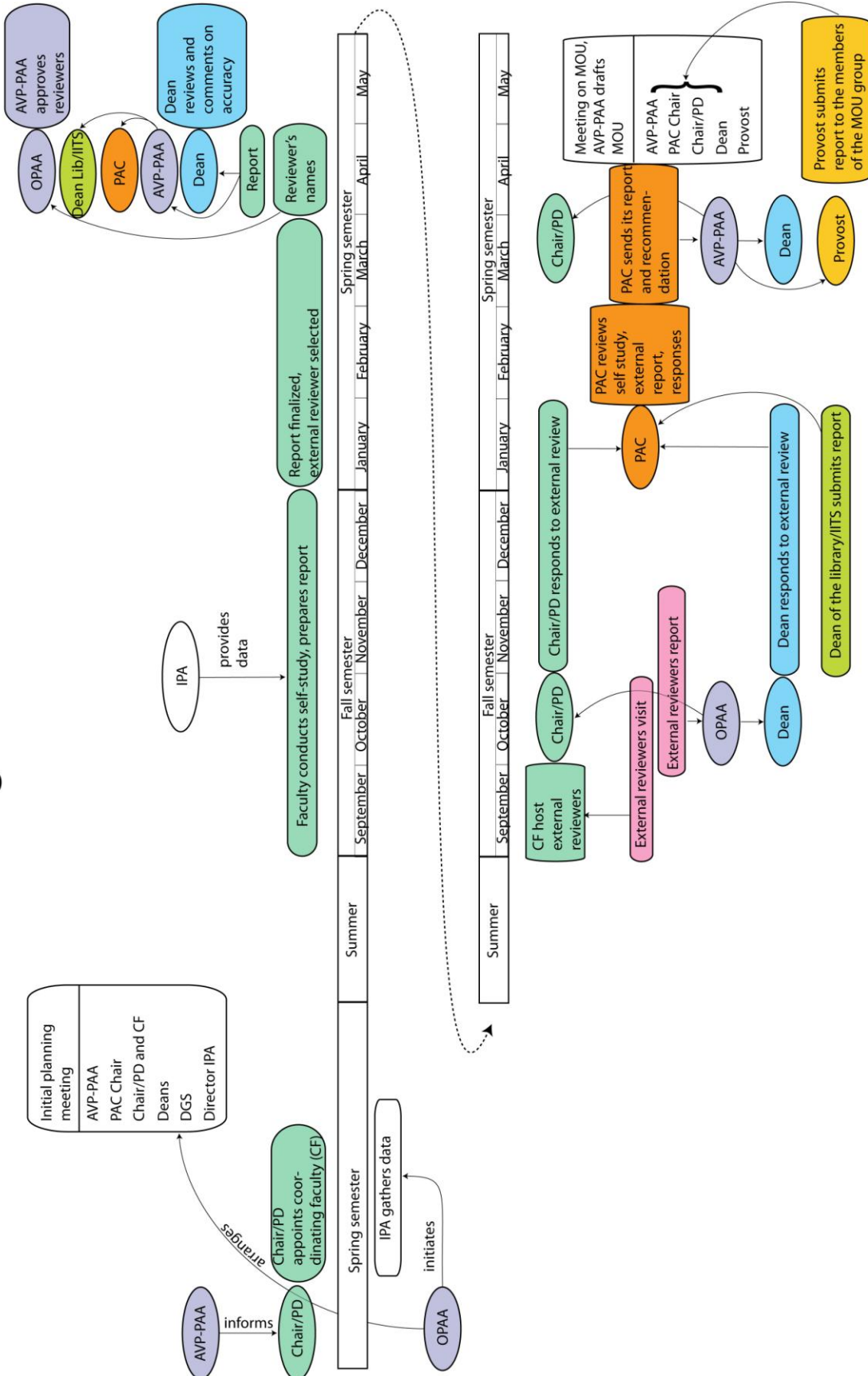
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668

Year Three – After the Self Study

SPRING SEMESTER	ACTIVITY
January	<ul style="list-style-type: none"> • AVP-PAA reports on program review and changes to Chancellor's Office (for Board of Trustees)

Program review timeline



674 **V. Accredited Programs**
675 Some CSUSM programs are accredited by their respective professional associations. CSU and
676 CSUSM Academic Senate policies provide that such accredited programs may substitute the
677 periodic review and site visit, which accompany such accreditation, for the self study and external
678 review. Such a substitution will only be permitted if annual assessment plans and reports have
679 been submitted by the academic program during the period prior to the accreditation process and
680 if the accreditation report includes a discussion of assessment and student learning outcomes.
681 The program will forward the accreditation report, as well as all appropriate annual assessment
682 plans and reports, to the AVP-PAA.

683
684 The program review process continues as detailed in Section III.E.-G. and Section IV.E.-G.

685
686 **VI. Option for Departments that Deliver Multiple Degrees**

687
688 Departments reviewing more than one degree in a program review cycle may choose to write a
689 single comprehensive report that covers multiple degrees, or separate reports for each degree. A
690 single report may be preferred when the degrees under review have substantial overlapping
691 elements. If this approach is chosen, the program lead should confer with the Chair of PAC and
692 the AVP-PAA to agree upon the overlapping elements, which should be treated separately, and to
693 adjust the document page limit.
694

695 **VII. Sections of the Self-Study Report**

696
697 The self study is a collective undertaking and is a key step in program review. In a manner
698 parallel to WASC's criteria of institutional review, the self study demonstrates that the program
699 has reflected upon key elements of its program, focused especially on program capacity and
700 educational effectiveness.

701
702 The self-study report is intended to provide the opportunity to give a past, present, and future
703 perspective on the program. There are four audiences for the self-study: external reviewers,
704 Dean, Provost, and PAC. The self study should reflect the unique nature of the program for those
705 audiences by:

- 706
707
 - responding to the previous program review recommendations;
 - describing the current state of the program; and
 - articulating the future aspirations of the program.

710
711 The self study should show alignment of the program with the educational and strategic elements
712 of the University and of the wider CSU.

713
714 The self-study report shall contain the following five sections and should not exceed 15pages¹:

- 715
 - *Introduction to self-study*
 - *Achieving educational objectives*
 - *Developing and applying resources*
 - *Additional themes/Special issues*
 - *Planning for the next five years*

720
721 **Section One - Introduction**

¹ Single spaced, 12 point font, Times New Roman, one inch margins.

722 This short section (no more than **two** pages) serves primarily as an introduction to the program
723 for the external reviewer(s). Possible topics for reflection include:

- 724 • Program mission statement/program goals (if changes have been made since the last
725 program review, discuss them here);
- 726 • Distinctiveness of the program from that of other CSUs or elsewhere; and
- 727 • Relationship of program mission to the University's mission and goals.

728
729 **Section Two - Achieving Educational Outcomes**

730 In this section, the program documents how it achieves its educational objectives through
731 teaching and learning, scholarship and creative activity, and support for student learning. The
732 program shall engage in, and write responses about, the following activities:

- 733
734 • Reflect on the annual assessments conducted since the previous program review (the annual
735 reports and associated feedback from the OPAA should be placed in an appendix attached to
736 the self-study report). What did you assess? What did you learn about student learning from
737 these assessments? What changes have been made/will be made as a result?
- 738 • Examine the program's student learning outcomes (SLO) and course by SLO matrix. Describe
739 any changes or updates that need to/will be made (attach matrix as an appendix).
- 740 • Examine the curriculum and student flow through the major in terms of where SLOs are
741 addressed. Does the sequence of major courses allow for/encourage growth in learning
742 based on the SLOs?
- 743 • Describe any changes in the major that have been made since the last program review, and
744 discuss the rationale supporting the changes. How will you assess the effectiveness of
745 changes to the curriculum in terms of the student learning outcomes?
- 746 • If available, describe evidence beyond the annual assessments of SLOs showing that students
747 are achieving the program's desired learning outcomes. Such evidence could include
748 measures of student satisfaction (current students and alumni), assessment of capstone
749 activities, graduate school acceptance rates, etc.
- 750 • Describe how the program contributes to the University curriculum? What are the program's
751 obligations and contributions beyond its own major? How do the SLOs for service courses
752 reflect the University's mission?

753
754 **Section Three - Developing and Applying Resources (Capacity Review)**

755 In this section, the program describes how it sustains its operations and supports the attainment
756 of its educational objectives through investment in human, physical, fiscal, and information
757 resources (e.g., technology and library, etc.). In other words, the program should describe the
758 extent to which it has the resources it needs. The self-study report should focus only on the most
759 important areas (typically, not more than **two**). The previous program review report should be
760 referenced whenever possible. All programs will provide faculty profile information on a
761 template that will be provided by OPAA. The following is a list of possible questions to consider:

- 762
763 • Does the program employ faculty in sufficient numbers, and with appropriate ranks,
764 professional qualification, and diversity to support its academic program consistent with
765 its educational objectives?
- 766 • Does the program employ professional staff in sufficient numbers and with appropriate
767 experience to maintain and support its academic programs?
- 768 • Are faculty workload, incentives, and evaluation practices aligned with institutional practices?
- 769 • Is the program able to support appropriate and sufficient faculty development opportunities
770 that are designed to improve teaching and learning?
- 771 • Are fiscal and physical resources aligned with program educational goals, and are they
772 sufficiently developed to support and maintain the kind of educational program it delivers?

- 773 • Does the program have access to information resources, technology, and staff sufficient in
774 size and skill to support its academic offerings and the scholarship of its faculty?
775 • Are the program's organizational structure and decision-making processes clear
776 and consistent with University policies and effective in supporting the program?
777

778 **Section Four - Additional Themes/Special Issues**

779 In this section, the academic unit will reflect on no more than **two** other issues that are of
780 importance to the program and faculty at the time of the review. Below are several possible
781 topics and questions that program faculty may want to consider. They are only suggestions. This
782 section should contain a discussion of the most important/pressing issues faced by the program.
783

784 *Student readiness*

- 785 • Have entry-level requirements for the major been adjusted since the last program review?
786 • How ready are incoming freshmen, transfer students, and beginning graduate students to
787 begin their coursework in the program?
788 • Does the program have relationships with counterparts at local high schools, community
789 colleges, and nearby four-year institutions that are used to improve the readiness of arriving
790 students?
791

792 *Graduates*

- 793 • Are graduates well prepared to begin their chosen careers or advanced study?
794 • What program improvements might enhance the preparation of graduates?
795

796 *Advising and mentoring*

- 797 • How is academic advising handled within the program?
798 • How are students in the major made aware of career opportunities?
799 • How does the program assess the quality and quantity of student contact with program
800 faculty?
801 • What program improvements might enhance the academic and career advising of students?
802

803 *Enrollment and progress towards graduation*

- 804 • Have there been enrollment trend changes in the number of majors since the last program
805 review?
806 • Does the major have a sufficient student base to be able to offer required courses often
807 enough to allow students to make rapid progress toward completion of their degrees?
808 • What measures are taken to ensure timely academic progress of students, and how effective
809 are these?
810 • If program faculty have relationships with counterparts at local high schools, community
811 colleges, and nearby four-year institutions, how are these used to attract majors?
812

813 *Pedagogy and instruction*

- 814 • How do the research and creative activities of the program faculty manifest themselves in the
815 academic degree program? In particular, how are students encouraged to become active
816 participants in faculty research activities?
817 • How are different modes of instruction used in the major? In particular, how are students
818 encouraged to become active participants in the learning process, and how is technology
819 used?
820 • Is the academic degree program offered—in whole or in part—off-campus? If so, how is the
821 quality of the off-campus program maintained?
822 • Does the program offer on-line courses? How do these courses fit into the curriculum?

- 823
- 824
- 825
- 826
- How is course staffing determined by faculty expertise, rank, and status (tenure-line versus lecturer)?
 - In courses with multiple sections/instructors, are the sections coordinated? If they are coordinated, how is this done? If they are not coordinated, should they be?

827

828 *Extracurricular activities*

- 829
- 830
- 831
- 832
- What extracurricular or co-curricular experiences and activities are supported by the program (for example, student clubs and organizations, student involvement in research, etc.)?
 - What is the level of participation by majors in these activities, both in terms of numbers of students and depth of commitment?

833

834 **Section Five - Planning for the Next Five Years**

835 In this section, the program faculty and staff reflect upon how effectively the program is
836 accomplishing its purposes and achieving its educational objectives. This section should begin
837 with a short section about how the results of the previous five-year review have been used to
838 improve program quality and learning outcomes.

839

840 The self study will conclude with specific recommendations for program improvement and future
841 directions. These recommendations should be clearly linked to evidence provided in the self-
842 study narrative and be framed as actionable items that, if undertaken by the program faculty,
843 staff, and others in the wider University, will improve program quality.

844

845 **VIII. Model Outline of a Self-Study report**

846

847 Although no single presentation format is prescribed for the self-study report, the report should
848 respond to each of the five Elements of Self Study listed above. Since each self-study report
849 serves as the foundation for the entire review process, the needs of the different reviewers
850 (external reviewers, members of the PAC, administrators) should be considered in preparation of
851 the document.

852

853 Contents for the Self Study Report should be organized in the following fashion:

854

- 855
1. Cover page
 2. Table of Contents
 3. List of Exhibits (tables, figures, etc.)
 4. Self-study (organized by responses to each element)
 5. Appendices (relevant portions of the data notebook, annual assessment reports and OPAA responses, previous program review executive summary and recommendations)

860

861

862 Later in the process, the report of the external review team, comments and recommendations
863 from the program chair, Dean, and Provost, as well as recommendations of the PAC, and the
864 MOU will be appended to the Self-Study Report. Together, these materials constitute the
865 completed program review.

866

867

868 **Appendix A: Program Data Notebook**

869

870 Responsibility for preparing the data notebook rests with the OAPA. The program faculty will be
871 asked to contribute some information (items B3 and 4). The data notebook is intended for use by
872 the program as they prepare their program review self-study. It also contains information of
873 interest to both internal and external reviewers. The data notebook consists of the following
874 information:

875

876 **A. Students in the Major**

877 1. Numbers of Majors and Degrees Awarded.

878 2. Full-time Equivalent Student (FTES) and Student to Faculty Ratio (SFR) Data.

879 3. Undergraduate and Graduate Student Profile Data (such regularly produced demographic data
880 for students in the major as age, ethnicity, gender, residency, average credit hour load, mean
881 GPA at entry and annually, median SAT scores, remediation status, etc.)

882 4. Retention and graduation data for both undergraduate and graduate students in the program.

883 5. Relevant findings from other surveys (if number of majors/students responses allow).

884

885 **B. Program Faculty**

886 1. List of Tenured/Tenure-Track Faculty.

887 2. Demographic Data on All Program Faculty (e.g., gender/ethnicity/rank).

888 3. Abbreviated Curriculum Vitae of Tenured/Tenure-Track Faculty .

889 4. List of Grants/Awards received by program faculty in the preceding five-year period.

890

891

892 **Appendix B: [Policy]**

893

894

1 **1st reading – BLP/UCC: Single Subject Preparation in History**

2
3 **BLP Report:** The Budget and Long Range Planning Committee (BLP) has reviewed the P-Form for an option in
4 the History major that underwent revision for state accreditation purposes. This option satisfies state standards
5 allowing graduates to bypass the California Subject Exam for Teachers (CSET) on their way to a teaching
6 credential. Our review included attention to the option's likely enrollments as well as its resource implications.
7 BLP submits the following analysis of the impact of this proposed credential to the Academic Senate to assist
8 senators in their consideration of the proposal.
9

10 Program Demand: The P-form indicates that the number of History majors pursuing the previously approved
11 option (which expired in 2009) ran anywhere from 10-60 students; the proposal does not anticipate significant
12 enrollments in future years due to uncertain job prospects for prospective teachers, but the proposal emphasizes
13 the minimal resource implications of the proposal.
14

15 Resource Implications:

16 *Overview:* This proposal was prompted by the expiration of the previous waiver certification. The new proposal
17 includes attention to state-mandated advising resources and additional curriculum requirements.
18

19 *Curricular & Faculty Resources:* To fulfill state requirements, History students pursuing this option must take EDUC
20 350, an existing course providing field experience to undergraduates. Upper-division coursework also draws from
21 Economics, Geography, and Political Science. Further, one new 1-unit course was developed to meet the new
22 state standards: HIST 393 Experiential Learning in History for Future Teachers.
23

24 Additionally, state standards now mandate the designation of a program-level "coordinator" specifically for this
25 option. While it is currently anticipated that advising needs can be handled within the History Department's
26 current faculty advising capacity, a surge in student interest could lead to a need for increasing that capacity (e.g.,
27 a funded course release for the designated advisor).
28

29 *IITS/Library Resources:* No resource requirements were noted.
30

31 **UCC Report:** UCC has finished its review of the option of Single Subject Preparation in History, which is in fact a
32 renewal of an existing option for the history major. The reason it comes back as a new program/option review is
33 because that the state certification had expired as of 2009 but the renewal application did not get approved until
34 this spring. There is only a minor change of this option proposal compared to the expired one, which was to
35 require students take EDUC 350 (Foundation of Teaching as a profession) early in the program, and to add a new
36 course HIST 393 (Experiential Learning in History for Future Teachers, offered previously as a special topic course)
37 to supplement EDUC 350. The changes are aligned with the California Committee on Teaching Credentialing
38 (CCTCT) requirements in order to get the renew approval.
39

40 The program and courses have been designated by the state is students wish to waive the California Subject Exam
41 for Teachers (CSET). The courses provide history depth, social science breadth and teaching preparation in
42 accordance with state credentialing requirements for high school teachers. It is an interdisciplinary option which
43 will be hosted under the history department in the catalog.
44

45 The program requires that students take 30 units Lower-Division Preparation courses and 46 units of Upper
46 Division requirements. The detailed list of course requirement is provided in the catalogue description attached.
47 All the courses except one (HIST 393) are existing courses since this is simply a renewal of existing option. UCC has
48 reviewed the overall proposal and see no additional issues to be addressed. UCC has voted and approved to
49 forward it for review by the Academic Senate.
50

51 For the complete curriculum associated with this proposal, visit the Curriculum Review website:

52
53 [http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-](http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-11_curriculum.html#CoAS)
54 [11_curriculum.html#CoAS](http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-11_curriculum.html#CoAS)
55

56 The proposal is #45 in the College of Arts & Sciences listing
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**Proposed Catalog Language for the
Single-Subject Preparation in History/Social Science, History Major Option**

Students interested in majoring in History and teaching at the secondary level may elect the Single-Subject Option in History/Social Science. Successful completion of this option will allow students to waive the California Subject Examination for Teachers (CSET) in History/Social Science. For certification of this option, students must maintain a 2.7 GPA both in overall work and in all courses used to complete the major and option.

Lower-Division Preparation for the Major:

Thirty units in lower-division courses including:

U.S. History Survey HIST 130 and 131	6 units	
World History HIST 101 and 102		6 units
Related breadth courses including U.S. Government (PSCI 100)	3 units	
Economics including Macro/Micro economics (ECON 201 and 202)	6 units	
GEW		3 units
Supporting social science courses: PSYC 100 and SOC 101 recommended, but other lower or upper division courses in Psychology or Sociology can satisfy this requirement.	<u>6 units</u>	
Total		30 units

Upper Division Requirements:

Forty-Six units in upper division courses including

GEOG 302 or 320		3 units
Political Science, U.S. focus, Choose from: PSCI 305, 321, 412, 413	3 units	
Political Science, Global focus Choose from PSCI 331, 350	3 units	
EDUC 350		3 units
Note: HIST 393 and EDUC 350 should be taken concurrently.		
HIST 301 Historical Methods and Writing	3 units	
HIST 347 California History	3 units	
2 U.S. Courses from HIST 336C, 336D, 336E, 336F	6 units	
Upper Division History electives, U.S. focus	6 units	
Upper Division History electives, non-U.S. focus	12 units	

Note: Of the above, courses must be taken from at least three world areas that include: Africa, Asia, Europe, Latin America, Middle East, and Comparative/Transnational history

110	HIST 393 Experiential Learning in History for	
111	Future Teachers	1 unit
112		
113	History course, 400 level seminar	<u>3 units</u>
114	Total	46 units

115

116 Note: of the history courses above:

117 a. one course must have the majority of its content before 1800

118 b. one course must have considerable content on Women History/Gender.

119 c. one course must have significant consideration of ethical, moral, or religious issues in history.

120 (Choose from: HIST 306, 310, 313, 317, 318, 323, 341, 343, 356, 360, 380, 383, 388)

121 Students must complete and submit a portfolio of their coursework with a written narrative reflecting on
 122 their pre-credential teaching experience, and must complete all above courses with GPA of 2.7 or above.

123

124

125

126 New Course approved with this Option:

127

128 HIST 393 Experiential Learning in History for Future Teachers 1 unit

129

1 1st reading – BLP/UCC: Single Subject Credential Program/English Language
2 Authorization with Option for Preliminary Mild/Moderate Education Specialist Credential
3

4 **BLP Report:** The Budget and Long Range Planning Committee (BLP) has reviewed the P-Form for a proposed
5 teaching credential in the field of Single Subject Credential/English Language Authorization with Option for
6 Preliminary Mild/Moderate Education Specialist Credential. Our review included careful consideration of the
7 enrollment prospects for the proposed program as well as the resource implications of initiating the program. We
8 thank Professor Jacqueline Thousand, the proposer and also the COE representative to BLP, for her collegial
9 responses to our feedback and our queries so that we could provide a useful evaluation for the Senate's review.
10 BLP submits the following analysis of the impact of this proposed credential to the Academic Senate to assist
11 senators in their consideration of the proposal.
12

13 Program Demand: The P-form for this proposed curriculum lays out the state's continuing demand for special
14 education teachers at the secondary level. This proposed program would qualify candidates for teaching positions
15 to work with both "general and special education students in selected content areas."
16

17 Resource Implications:

18 *Overview:* This proposal was prompted by a change in California's statewide accreditation requirements, which
19 required the revision of existing COE curricula. As noted in the P-form, the new program brings together courses
20 from programs currently known as the "Single Subject" and "Preliminary Mild/Moderate Education Specialist,"
21 both of which included an "Authorization to Teach English Learners." The program has already been available to
22 students for some time.
23

24 *Curricular & Faculty Resources:* The program of study is already being offered, and the current P-form "formalizes
25 the combined program as a credential option" that would be represented in the CSUSM Catalog. The statewide
26 accreditation revisions required the addition of one new course in the COE curriculum, EDMX 575, Education
27 Specialist Transition Development Plan.
28

29 Eleven current COE faculty members are expected to participate in various aspects of the credential; the COE has
30 made clear that this new program can be launched and maintained for the first several years even without new
31 faculty hires.
32

33 *IITS/Library Resources:* While information provided by the Library indicates that the proposed program could
34 benefit from subscriptions to additional journal databases (specifically, Education Research Complete and
35 ProQuest Education Journals were mentioned), COE has made clear that this new credential can be launched and
36 maintained without new Library or IITS resources. The proposed new course, EDMX 575, will be required to meet
37 CSU "accessibility" requirements, but it can be offered with currently available resources. However, as with *all*
38 curriculum proposals, it is imperative to bear in mind the "inflationary costs" associated with access to journal
39 databases; the Library's Dean estimates "that additional annual increases of 8-10% [in the Library's Collections
40 budget] will be needed to continue purchasing content at the current level."
41

42 An additional point that came up during BLP's discussion of this proposal was the campus's need for enhanced
43 IITS support for students whose classes meet on evenings and weekends, windows when IITS is currently
44 unavailable. The proposed Catalog language specifically identifies this program as being offered during evenings
45 and weekends, so the lack of IITS support is particularly troublesome here. This statement is not intended as a
46 criticism of the current proposal; it is instead an acknowledgement of how students can be better served by
47 aligning resources for student support with a realistic assessment of when courses are being taught on campus.
48

49 **UCC Report:** UCC has finished its review of the *Single Subject Credential Program/English Language Authorization*
50 *with Option for Preliminary Mild/Moderate Education Specialist Credential option*. The purpose of the option is to
51 provide students the aggregate of courses that melds the courses for the Single Subject and Preliminary
52 Mild/Moderate Education Specialist Credentials, both of which offer the Authorization to Teach English Learners.
53 There has been a critical demand for special education teachers who are qualified to teach single subject content
54 at the secondary level. This program meets this demand by integrating the Preliminary Mild/Moderate Education
55 Specialist coursework and clinical practice with the Single Subject Credential coursework and clinical practice. The
56 candidates can be highly qualified to teach general and special education students in selected content areas.
57

58 The program provides students a variety of choices. There is a total of 34-35 units of course requirement for Single
59 Subject Credential Candidates, including 17 units of core courses, 3-4 unit of additional Single Subject area
60 methods course elective, and two Single Subject clinical practice course (EDSS 571 and 572). For Candidates who
61 want to acquire Concurrent Single Subject AND Mild/Moderate Education Specialist Credentials, there is a 56-57
62 unit course requirement, including 18 units of core common course work, 3-4 unit of additional Single Subject area
63 methods courses, 20 units of additional Preliminary Mild/Moderate Education Specialist Courses, and 15 units of
64 Concurrent Single Subject and Education Specialist Candidates Clinical Practice. The detailed list of course
65 requirement is provided in the catalogue description attached.

66
67 There is only one new course proposed accompanying this proposal: EDMX 575, Education Specialist Transition
68 Development Plan, 2 units. This course is developed and added to the updated Preliminary Mild/Moderate
69 Education Specialist program options to bring the options into compliance with new (2010) California Committee
70 on Teaching Credentialing (CCTCT) Education Specialist standards. UCC has reviewed the overall proposal and see
71 no additional issues to be addressed. UCC has voted and approved to forward it for review by the Academic
72 Senate.

73
74 For the complete curriculum associated with this proposal, visit the Curriculum Review
75 website:

76 [http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-](http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-11_curriculum.html#CoE)
77 [11_curriculum.html#CoE](http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-11_curriculum.html#CoE)

78

79

80 **Proposed Catalog Language for the** 81 **Single Subject/English Learner Authorization and Preliminary Mild/Moderate Education Specialist** 82 **Credential**

83

83 **Admission**

84

85 Admission requirements for the Single Subject (Secondary) Credential program and Preliminary
86 Mild/Moderate Education Specialist options are the same as the Multiple Subject Admission
87 Requirements.

88

89 Subject Matter Competency: Teacher education candidates in California are required to demonstrate
90 competence in the subject matter they will be authorized to teach. Subject matter competency must be
91 completed before beginning the program.

92

93 Information, test preparation, and registration are available online at www.ctcexams.nesinc.com

94

95 **Program Description**

96

97 The Single Subject Credential Program is offered as a Day and Evening program and may include
98 weekends. The subject areas available are: English, Mathematics, Science, Social Science, Spanish and
99 Physical Education. A Concurrent Single Subject and Preliminary Mild/Moderate Education Specialist
100 option also is available.

101

102 Single subject (high school) teacher education candidates enroll in a program designed to prepare them to
103 teach students in grades seven through twelve. Upon completion of the program, candidates receive a
104 Preliminary Single Subject Credential. Those who complete the concurrent option also receive the
105 Preliminary Mild/Moderate Education Specialist Instruction Credential that also authorizes instruction to
106 students in grades K through 12 and adults with a primary disability of Autism Spectrum Disorder,
107 Emotional Disturbance, Mild/Moderate Mental Retardation, Other Health Impairment (e.g. Attention
108 Deficit Disorder), or Specific Learning Disability.

109

110 **In the day program two-semester curriculum, candidates take courses in teaching and learning in high**
111 **schools, discipline and interdisciplinary specific methods, and multilingual/multicultural education.**
112 **The evening program is designed for individuals who work during the day and take evening and**
113 **weekend coursework with the exception of student teaching. Coursework is taught by a team of**

114 **instructors with class sessions and assignments geared to the particular needs of high school teachers**
 115 **and learners. The teaching team is comprised of faculty from both the Colleges of Education and Arts**
 116 **and Sciences and is assisted by educators from North County high schools who share expertise and**
 117 **experiences and model exemplary high school practices.**
 118

119 North County public secondary schools serve as sites for single subject field experiences. Supervision of
 120 single subject clinical practice is a shared responsibility of a university faculty advisor and an on-site
 121 liaison (a full time teacher at the school site). Two different opportunities at different school sites
 122 constitute the field experience. Within these experiences there are opportunities to practice teaching in a
 123 variety of subjects to diverse student populations with varying ability levels. During clinical practice,
 124 candidates are encouraged to participate in school faculty activities outside of the classroom in order to
 125 gain experience and expertise in the organizational and decision-making characteristic of a high school
 126 culture.
 127

128 An important aspect of the program is the acquisition of the authorization to teach English learners in
 129 order to better serve the needs of students from diverse language and cultural backgrounds.
 130 Requirements are met through the infusion of content and experience through specific courses and during
 131 clinical practice experiences.
 132

133 The California Commission on Teacher Credentialing has adopted Subject Matter Authorizations as an
 134 alternative method to obtain an additional subject area authorization. It is recommended that candidates
 135 obtain additional authorizations. Please attend a Supplementary Authorization and Subject Matter
 136 Authorization Workshop as indicated at www.csusm.edu/coe/adbvising/CurrentStudentsInfo.html.
 137

138 **COURSE SEQUENCE FOR SINGLE SUBJECT CREDENTIAL CANDIDATES**
 139

Courses	Units
141 EDSS 511	3
142 EDSS 521	3
143 EDSS 530	3
144 EDSS 531	2
145 EDSS 541	3
146 EDSS 555	3
147 <i>Total Core Common Coursework Units</i>	17
148	
149 <i>Additional Single Subject subject area methods course requirements.</i>	
150 <i>Each candidate enrolls in the appropriate subject area course for a total of 3 to 4 units.</i>	
151 EDSS 543A (2 units) & EDSS 543B (2 units)	4
152 EDSS 544A (2 units) & EDSS 544B (2 units)	4
153 EDSS 545A (2 units) & EDSS 545B (2 units)	4
154 EDSS 546A (2 units) & EDSS 546B (2 units)	4
155 EDSS 547	3
156 KINE 401	3
157 <i>Total Subject Area Coursework Units</i>	3-4
158	
159 Single Subject Only Clinical Practice	
160 EDSS 571	6
161 EDSS 572	8
162 <i>Total Single Subject Only Clinical Practice Units</i>	14
163	
164 <i>Total Single Subject Program Units</i>	34-35
165	

166 **COURSE SEQUENCE FOR CONCURRENT SINGLE SUBJECT AND**
 167 **MILD/MODERATE EDUCATION SPECIALIST CREDENTIAL CANDIDATES**
 168

Courses	Units
170 EDSS 511	3

171	EDMX 622	4
172	EDSS 530	3
173	EDSS 531	2
174	EDSS 541	3
175	EDSS 555	3
176	<i>Total Core Common Coursework Units</i>	18
177		
178	<i>Additional Single Subject subject area methods course requirements.</i>	
179	<i>Each candidate enrolls in the appropriate subject area course for a total of 3 to 4 units.</i>	
180	EDSS 543A (2 units) & EDSS 543B (2 units)	4
181	EDSS 544A (2 units) & EDSS 544B (2 units)	4
182	EDSS 545A (2 units) & EDSS 545B (2 units)	4
183	EDSS 546A (2 units) & EDSS 546B (2 units)	4
184	EDSS 547	3
185	KINE 401	3
186	<i>Total Subject Area Coursework Units</i>	3-4
187		
188	<i>Additional Preliminary Mild/Moderate Education Specialist Courses</i>	
189	EDMX 627	3
190	EDMX 631	3
191	EDMX 632	3
192	EDMX 633	3
193	EDMX 575	2
194	EDMS 521 or EDMX 521 Elementary Literacy	3
195	EDMS 543 or EDMX 543 Mathematics Education	3
196	<i>Total Additional Education Specialist Coursework Units</i>	20
197		
198	Concurrent Single Subject and Education Specialist Candidates Clinical Practice	
199	EDSS 572	8
200	EDMX 572	7
201	<i>Total Concurrent Single Practice and Education Specialist</i>	
202	<i>Clinical Practice Units</i>	15
203		
204	<i>Total Concurrent Single Subject and Mild/Moderate</i>	
205	<i>Education Specialist Program Units</i>	56-57
206		

207 Candidates in the Concurrent Single Subject and Education Specialist option meet with
208 Single Subject and Education Specialist program coordinators on a regular basis for
209 course sequence and clinical practice advisement and scheduling.

210
211 **Candidate Learning Outcomes and TPA and TPE Assessment**

212
213 Candidate learning outcomes are defined by SB2042 as Teaching Performance Expectations. The CSUSM
214 College of Education identifies additional TPEs beyond the state required TPEs in explicitly address
215 concepts stated in the COE Mission Statement. See details regarding TPEs in the single subject and special
216 education clinical practice handbooks at the COE website, www.csusm.edu/COE. Candidate must be
217 successful in meeting Single Subject and Education Specialist Teaching Performance Expectations to
218 progress in clinical practice and to be recommended for a credential.

219
220 Beginning July 1, 2008, all candidates entering programs that result in the issuance of a Multiple or Single
221 Subject Credential must pass all Teaching Performance Assessment (TPA) assessments before an online
222 recommendation for the credential can be submitted to the California Commission on Teacher
223 Credentialing (CCTC) by the Student Services Center.

224
225 Beginning January 1, 2011, all candidates entering programs that result in the issuance of a Preliminary
226 Education Specialist Instruction Credential must demonstrate satisfactory performance through
227 coursework and verified clinical practice on the full range of Preliminary Education Specialist Teaching

228 Performance Expectations and develop a written Individualized Transition Development Plan for use in
229 the candidate's Clear Credential Program.

230

231 **Clear Credential Requirements**

232

233 Successful completion of the Single Subject program results in issuance of a 5-year Preliminary Single
234 Subject Credential. SB 2042 requires employment as a full-time teacher and completion of an induction
235 program to qualify for a Clear Single Subject Credential. Those who earn the 5-year Preliminary
236 Mild/Moderate Education Specialist Instruction Credential also must complete an induction program to
237 qualify for the Clear Education Specialist Instruction Credential. An essential clearing requirement is the
238 development of a written Individualized Induction Plan (IIP) of supported induction and job related
239 advanced professional preparation approved and signed by the clear credential candidate, an employer
240 designee, and a CCTC-approved clear credential program sponsor (e.g., district BTSA program,
241 university, County Office of Education). See the CCTC website for currently approved clear credential
242 sponsors. The IIP for employed Education Specialists must be written to clear all general and special
243 education preliminary credentials held, may include up to 12 semester units of university coursework,
244 and must be developed within 60 days of employment. Preliminary Education Specialist credential
245 holders not employed in a school setting may complete the Education Specialist clear credential
246 requirements if the parties signing the IIP agree to a setting and professional development activities that
247 allow demonstration of effective teaching to clear all preliminary credentials held.

248

249

250

251 New Course being approved with this Credential:

252 EDMX 575 Education Specialist – Transition Development Plan 2

253

1 **1st reading – BLP/UCC: Bachelor of Science in Business Administration / Temecula campus**

2
3 **BLP Report:** The Budget and Long Range Planning Committee (BLP) has reviewed the P-Form for an additional
4 Option for the Bachelor's of Science in Business Administration. This option will be offered solely at CSUSM's
5 Temecula facility as a self-support program run through Extended Learning. It represents an adaptation of
6 CSUSM's existing BSBA options, as it was not feasible to offer any of the existing options at this separate facility.
7 BLP's review included attention to the enrollment prospects for the proposed program as well as its
8 accompanying resource implications. We thank Professor Kathleen Watson, the proposer and also the COBA
9 representative to BLP, for her collegial attention to our feedback and our queries. Dean Guseman and Associate
10 Dean Eisenbach were also very helpful as we prepared this report. BLP submits the following to the Academic
11 Senate to assist senators in their consideration of the proposal.
12

13 Program Demand: The P-form does not address enrollment projections, but a viable self-support program at
14 Temecula would require a minimum cohort size of 22 students. It is not clear whether the program would be
15 delivered in its early years in the event that enrollment falls just short of that minimum.
16

17 It is believed that a CSUSM program offered at Temecula will be cost-competitive with comparable programs in
18 the region. Data provided by COBA provide a preliminary estimate of students' anticipated costs for this self-
19 support program: 64 Units (upper-division coursework) @ \$425/unit + \$157/semester fee for Temecula site=
20 \$28,142 for 2 years of upper-division coursework. The program's most likely competitor is believed to be the
21 University of the Redlands; the projected cost of that BSBA is \$38,085.

22 *For purposes of comparison:* projected CSUSM tuition/fees for two years of upper-division coursework at the main
23 campus are \$11,558/year tuition and fees x 2 years = \$23,116 (based on numbers available at CSUSM's website,
24 factoring in next year's projected fee increases).
25

26 Resource Implications:

27 *Curricular & Faculty Resources:* All of the courses in this curriculum are already offered at CSUSM. No new faculty
28 lines will be required to launch and deliver this option. All current COBA faculty members are potentially eligible
29 to participate in delivering this program at the off-site location. Tenure-track faculty members may be offered the
30 opportunity to teach a course in this option either as an "overload" course to earn extra compensation or as part of
31 their normal Academic Year teaching load. According to the draft "MOU" developed between COBA and
32 Extended Learning, the anticipated faculty compensation for this program is \$3250 per unit of instruction. COBA
33 does not anticipate difficulties in soliciting sufficient participation by tenure-track or lecturer faculty to deliver this
34 option; however, careful attention will need to be paid to how delivering this option may affect the availability of
35 sufficient faculty resources to maintain existing programs at CSUSM's main campus.
36

37 *IITS/Library Resources:* As a self-support program, this new option is expected *not* to place demands on "stateside"
38 IITS or Library resources; instead, all relevant IITS and Library costs must be built into course fees for students at
39 the Temecula site. While IITS has an "MOU" with Extended Learning to cover its support operations, careful
40 ongoing attention must be paid to Library resources both to ensure adequate access to students at the Temecula
41 site and to ensure that costs are not shifted to "stateside" budgets. One concern expressed in the Library's report
42 was that "offsite access" for "core print business reference sources that do not circulate" will need to be addressed;
43 if additional resources must be purchased, such expenses will need to be factored into the fee structure, certainly
44 increasing the program's cost. Additionally, with increasing attention to the Library's inflationary subscription
45 costs, it is likely that such costs will also need to be factored into the Temecula fee structure on an annual basis.
46

47 **Addendum to BLP's report on the Proposed Business Administration Option (Temecula)**

48 Several questions were posed by E.C. members regarding this program proposal, and the replies we received are
49 provided below:
50

51 **Questions:**

52 1. *How will the Catalog language noting that this option is only available at the Temecula site be enforced? For*
53 *example, what will stop current BSBA students from attempting to change their options?*
54

55 From Regina Eisenbach (Associate Dean, COBA): "This is a David Barsky question. He and I discussed a notation
56 indicating this is a Temecula program – and the courses will only be offered there. Also, since the option is

57 completely different – i.e. different foundation courses – it could take a campus student longer if they choose to
58 switch. Also, there is a cost difference, as you know, between the programs."

59
60 From Jennifer Jeffries (AVP for Planning, Accreditation, and Assessment): "Locations of programs can be
61 catalogue content. That info is also handled on the website of the college offering the program. David would
62 consult with CoBA on this issue."

63
64 *2. Given the "bottom line" cohort size requirement of 22 students, what happens if there is attrition in a cohort that*
65 *drops the cohort below the "magic number" after it has already launched? (Questions came up both about students*
66 *who choose to leave the program and students who may fail courses along the way.)*

67
68 From Jennifer Jeffries (AVP for Planning, Accreditation, and Assessment): "Under the WASC teach-out provision,
69 the university is obligated to provide a pathway for completion for students in the program regardless of self-
70 support status or geographic location of instruction. Should the number of students decline, Extended Learning
71 would reduce EL overhead in order to compensate for attrition. Additionally, since this is a new program startup,
72 EL would front startup costs in order to make the program a "go". An example of this would be that if there were
73 20 students, EL would provide the additional funds needed to round out to the minimum of 22 students from our
74 program development/reserve fund. If we felt that there wasn't a market for this program, we would be more
75 cautious and not offer to front-load startup costs. However, the interest in the program in Southwest Riverside is
76 such that EL is confident that front loading the start up costs is a viable model for initiating the degree program at
77 CSUSM Temecula. Extended Learning would be in consultation with CoBA in all these decisions."

78
79 *3. Concerns continue to be raised about how the effectiveness of the program at Temecula will be assessed and how it*
80 *will be included in Program Reviews. What steps are in place to ensure that this program is encompassed in ongoing*
81 *COBA assessment and PEP activities?*

82
83 From Regina Eisenbach (Associate Dean, COBA): "A degree in Temecula will be the same quality as a degree on
84 campus. Thus, whatever assessment we do on campus, such as the CSU wide Business Assessment Test, will be
85 done there. Also, there is a course release built into the cost of the program for a faculty director/coordinator – so
86 that person will have oversight over these issues."

87
88 From Jennifer Jeffries (AVP for Planning, Accreditation, and Assessment): "All degree programs, and options
89 contained therein, are subject to the program review process and annual assessment activities regardless of where
90 the program (or its option) is delivered and regardless of whether it is offered via state side or self support." [Note
91 from BLP: A program being offered through both state-support and self-support deliveries does not undergo
92 separate reviews for these distinct deliveries. The BSBA to be offered at Temecula would not be subject to a
93 separate Program Review process.]

94
95 **UCC Report:** UCC has finished its review of the new option of B.S. in Business Administration, proposed as a new
96 option offered through Extended Learning towards students in Temecula. The new option is housed in the College
97 of Business Administration. The purpose of the option is to serve the unique needs of the students in Temecula
98 and yet utilize the current resources the most effective way possible. The option is created by cutting across
99 departments in the colleges so one area is not over-burdened.

100
101 The program requires that students take a total of 64 units, including 9 units of GE credits, 26 units of Business
102 Foundation Courses, 20 units of business electives chosen from selected courses in at least 3 options, and 9 unit
103 capstone courses. The Foundation business courses include BUS 302-Foundation of Business Environments (2),
104 BUS 304-Data Analysis (4), FIN 304-Introduction to Corporate Finance (4), MIS 304-Principles of Management
105 Information Systems (4), MKTG 305-Principles of Marketing (4), MGMT 305-Organizational Behavior (4), OM 305-
106 Operations Management (4). The elective courses will be selected based on the coordination among CoBA
107 options. The capstone courses are: BUS 444-Strategic Management in Global Environments (4), BUS 492-Problem
108 Assessment and Critical Thinking (1), and BUS 493- Problem Analysis and Implementation (4).

109
110 This is a 64-unit undergraduate bachelor degree that combined a list of existing CoBA foundation courses across
111 department. There is no new course proposed accompanying this application. During the review process, the
112 committee has raised a series of questions/concerns. ***The major concern relates to the program offered through***
113 ***Extended Learning, such as the ensuring of the program quality, the impact on faculty workload, and the***

114 *impact on future students demand on our main campus. In addition, the committee also expressed concerns on*
115 *the possible online/hybrid courses.*
116

117 The following specific questions have been raised during the discussion. Regina Eisenbach, Associate Dean of
118 CoBA, was invited to UCC to address those questions. Below is a summary of the questions/answers:
119

120 **PART 1:** The following questions considered by the committee as being directly related to curriculum:
121

122 1. **Q:** How will the students choose electives?

123 **A:** The program is a cohort-based program. Students will not have the freedom to choose electives, per se.
124 The electives are just courses CoBA may offer differently to each cohort, based on student interest and faculty
125 availability.
126

127 2. **Q:** How different is the proposed program is from existing programs?

128 **A:** In existing programs, all the students take the 4-unit version core course of their own option, but 2-unit
129 versions from other business areas. For example, Marketing students are required to take Mktg 305 (4 unit
130 Principle of Marketing) but other business students (e.g. accounting, finance, MIS, etc.) only take Mktg 302
131 (the 2 unit counterpart of Mktg 305, Foundations of Marketing). In this new program, students are required to
132 take all the 4 unit version core courses, plus a few electives approved by the college.
133

134 3. **Q:** Where do Temecula students take Lower Division courses?

135 **A:** Usually, at Mt. San Jacinto College. The college has agreed and expressed great interest in providing the
136 necessary lower division courses.
137

138 4. **Q:** Is there possible attraction of the Temecula program to our existing students in San Marcos?

139 **A:** Not likely. Most of the existing students have already claimed an option here and cannot find the necessary
140 elective courses in Temecula.
141

142 5. **Q:** How long do student need to finish the program?

A: Approximately 6 semesters.

143 6. **Q:** How would students take electives?

144 **A:** Will be a collaborative effort by CoBA
145 faculty. Strictly speaking they are not electives because students won't have choices in a cohort.
146

147 7. **Q:** What is the value of the Temecula degree compared to the degree here?

148 **A:** Value of the degree should be the same at both campuses.
149

150 8. **Q:** Is there any plan to bring the program back to campus?

A: No plan.
151

152 9. **Q:** Will EL students have higher expectations since they pay more? **A:** They might.
153

154 10. **Q:** Nursing students at Temecula have complained about the unavailability of personal advising. Has CoBA
155 thought about it?

156 **A:** CoBA has not thought about it yet.
157

158 11. **Q:** What is the student capacity here?

A: We are impacted as a major.
159

160 **PART 2:** The following questions are considered by the committee as not being directly related to curriculum.

161 However the committee feels that the questions should be acknowledged to the senate when reviewing the
162 proposal:
163

164 1. **Q:** The IITS report has mentioned the cost of online courses. The committee did not find any online courses in
165 the proposal.

166 **A:** There is no pure online course. However, some sessions of BUS 304 (Business Statistics) have been taught
167 as hybrid courses. CoBA has not decided whether to offer pure face-to-face lecture or a hybrid statistics course.
168

169 2. **Q:** What is the Assessment plan of the Temecula program?

- 170 **A:** Nothing different from what we do here. Students will take exit exams prior to graduation (the BAT exam)
 171 as one way to evaluate their learning.
 172
- 173 3. **Q:** Who will be teaching the program?
 174 **A:** Courses will be offered to current CoBA faculty on an overload basis. No plan to hire more adjunct faculty.
 175
- 176 4. **Q:** What is the ultimate goal, to help eventually build another CSU at Temecula or purely revenue driven?
 177 **A:** CoBA has been asked by the administration of our campus to look into the possibility of meeting the
 178 demand up there. Communities in Temecula have expressed strong interest to our central administration.
 179
- 180 5. **Q:** Are there resources for program assessment and course assessments? Any state subsidy?
 181 **A:** The assessment resource will come mostly from EL. EL has promised on course support and administrative
 182 support. CoBA advisors are currently working on training EL advisors. There is course release built into the cost
 183 of the program for a faculty coordinator/director who will be involved with program assessment.
 184
- 185 6. **Q:** Will faculty hold office hours at Temecula? **A:** Yes. They will have offices and hold office hours.
 186
- 187 7. **Q:** Are the scholarships offered here available to Temecula students? **A:** They should be.
 188
- 189 8. **Q:** Student accessibility to the services such as library, writing center, etc.? **A:** Not available.
 190
- 191 9. **Q:** What are the RTP implications? Who can ensure junior faculty will not be teaching too many overload
 192 courses and affecting their research and service activities? In SoN, faculty are bought out to teach in Temecula.
 193 But compensation is lower comparing to teach in the state support program. How is CoBA faculty being
 194 compensated?
 195 **A:** Department chairs should have a conversation with the faculty who teach the programs. CoBA has talked to
 196 EL and has been offered a rate that all the CoBA faculty have agreed upon.
 197

198 For the complete curriculum associated with this proposal, visit the Curriculum Review website. The
 199 proposal is in Packet #7.
 200 [http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-](http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-11_curriculum.html#CoBA)
 201 [11_curriculum.html#CoBA](http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-11_curriculum.html#CoBA)
 202

203 **Proposed Catalog Language for the Option in Business Administration**

204 **Business Administration Option (55 units)**

205 This option is only available to students earning their degree at CSUSM Temecula.

206 The coursework of this option provides a broad exposure to all the business disciplines with the intention
 207 of giving the student a general background in business. Further study in 3 additional disciplines provides
 208 greater depth in certain areas, thus preparing students for a variety of career opportunities.
 209

210 Foundations of Business (26 units)

211	BUS 302	2
212	BUS 304	4
213	FIN 304	4
214	MIS 304	4
215	MGMT 305	4
216	MKTG 305	4
217	OM 305	4

218 Business Administration Option Electives 20 units taken from selected courses in at least 3 options

219 Capstone (4 units)

220	BUS 444	4
-----	---------	---

221 Senior Experience (5 units)

222	BUS 492	1
223	BUS 493	4

1 **1st reading – APC: Inactive Course Policy Revision**

2
3 *Summary of Changes made in the Inactive Courses Policy/Procedure.*

4 The location of revision in current policy document is listed in brackets, where appropriate. Most revisions occur
5 broadly across the document

- 6 • Whereas/Resolved resolution language has been replaced by a shorter Executive Summary.
- 7 • The old policy statement (previously hidden in the Overview) has become an explicit policy. The language
8 has been updated and made more precise, but there are no substantive changes. [Section II]
- 9 • The procedures have been updated:
 - 10 ○ The section on “Voluntary Inactivation of Course and Programs of Study” has been largely
11 eliminated since the program inactivation part of this procedure has been superseded by the
12 Academic Program Discontinuance Policy.
 - 13 ○ The inactivation process is now a biennial, rather than annual, process since the catalog is now
14 biennial.
 - 15 ○ Courses slated for inactivation are those that have not been offered in a 3.5 year period; the old
16 procedure targeted courses that had not been offered in 2.5 years.
 - 17 ○ Instead of defining “inactive” and “deleted” courses, inactive courses are divided into two
18 groups: recently inactive (i.e., “re-activatable,” [previously termed “inactive”]) and older inactive
19 (i.e., re-activatable only via curricular review and approval process [previously termed
20 “deleted”]).
 - 21 ○ Courses required for a program cannot be eliminated, but the appropriate Dean’s office will be
22 notified when such courses turn up as candidates for inactivation by virtue of not having been
23 offered for three consecutive years. [Section III, A, 4]
 - 24 ○ When courses that are electives in programs are inactivated, they are removed from the
25 program lists of electives in the catalog. [Section III, E]
 - 26 ○ “Office of Academic Programs” is replaced throughout by “Curriculum and Scheduling Office.”
27

28 *Rationale: This policy establishes procedures for the removal of courses from the catalog that have not been offered*
29 *for prolonged periods and for their reinstatement. Implementation of this policy establishes a regular cycle of*
30 *communications between academic units, Academic Programs and the Academic Senate. The previous version of this*
31 *policy contained a resolution, which was unnecessary and redundant. Further, the previous version provided policy for*
32 *resolving inactive ‘Programs of Study’ which is addressed in the Academic Program Discontinuance Policy.*
33

Definition *The policy governs the treatment of inactive courses.*
Authority *Title 5 Section 40100*
Scope *Courses that have not been offered for prolonged periods.*

34
35 **I. EXECUTIVE SUMMARY**

36
37 This policy creates means by which courses offered infrequently may be periodically removed from the
38 catalog, and, for a certain period of time, re-instated in the catalog upon the decision of the academic unit
39 wishing to offer the course once again. By leaving open the possibility for rapid re-activation, this policy will
40 ensure a more accurate catalog listing of Active courses, without requiring irreversible deletion of courses that
41 are only temporarily removed from the catalog. This authority to remove courses from the catalog has
42 always existed; current technology now allows a formalized procedure for doing so.
43

44 **II. POLICY**

45
46 Courses that are not offered for several years shall be removed from the catalog and inactivated in the
47 administrative database (i.e., PeopleSoft CMS).

48
49 Courses that have been recently inactivated will be reactivated upon notification from the department that it
50 intends to offer them again.

51
52 Courses that have not been offered for many years must go through the curriculum review and approval
53 process in a manner similar to new courses.

54 III. PROCEDURE

55

56 A. Every other summer, the Curriculum and Scheduling Office will identify courses in the new catalog that
57 have not been offered in the preceding three academic years and that are not scheduled to be offered in
58 the fall. The following courses are exempt and will not appear on this list:

59

60 1. Generic course titles under which varying individual topics are offered

61

62 2. On-demand courses such as Independent research, Independent study, Internship, and Thesis

63

64 3. Courses that appear in the catalog for articulation purposes and which are clearly identified as
65 currently unoffered by CSUSM

66

67 4. Courses that are required for completion of a major, option, concentration, minor or certificate. The
68 Dean's Office of the college offering such a course will be notified that the course is not being
69 offered.

70

71 B. The Curriculum and Scheduling Office will then notify the appropriate academic units by September 1
72 that these courses are subject to removal from the catalog. The academic units may reply by:

73

74 1. Allowing the course to be inactivated (this is the default response)

75

76 2. Correcting the report (e.g., pointing out that the course has not been in the catalog for three years,
77 that it has been offered within the past three years, that it is scheduled for the fall, that it is one of
78 the exempt types of courses listed above [See Section IIIA], or that it was scheduled, but cancelled
79 due to low enrollment)

80

81 3. Committing to offer the course in the next two academic years.

82

83 C. Academic units may choose voluntarily to place individual courses on Inactive status by notifying the
84 Curriculum and Scheduling Office in the November 1 report.

85

86 D. Replies are due in the Curriculum and Scheduling Office by November 1. The Curriculum and Scheduling
87 Office will forward to the Academic Senate a list of all Inactivations as an information item for the
88 December meeting.

89

90 E. Inactive courses have their status changed in PeopleSoft to "Inactive" (which keeps them from being
91 included in future class schedules) and are removed from all areas of the catalog where the course is
92 referenced (i.e., electives in majors and minors, and the list of course descriptions located in the course
93 section of the catalog) for the subsequent published catalog. If removal of the course affects the unit
94 value of a program requirement, then a P-2 form must be submitted.

95

96 F. Requests for course re-activation must be included in the reply due in the Curriculum and Scheduling
97 Office by November 1. Academic Programs will forward to the Academic Senate a list of all re-activations
98 as an information item for the December meeting.

99

100 G. A course that has been Inactive for two catalog publication cycles may be reactivated at the request (sent
101 to the Curriculum and Scheduling Office) of the department offering the course. Re-activated courses will
102 be announced in the next published catalog or catalog addendum, in both the elective lists for any majors
103 and minors for which the course had been applicable prior to inactivation and in the list of course
104 descriptions.

105

106 H. Courses that have been inactive for longer than two catalog publication cycles must go through the usual
107 curriculum approval process as new courses.

1 1st reading – APC: Graduation Requirements Policy Revision
2

3 APC has reviewed the Graduation Requirements for Baccalaureate Degrees and Academic Certificate Programs
4 (see Graduation Requirements for Baccalaureate Degrees and Academic Certificate Programs - Effective
5 8/24/2010;
6 [http://www.csusm.edu/policies/active/documents/graduation_requirements_for_baccalaureate_degrees82410.ht](http://www.csusm.edu/policies/active/documents/graduation_requirements_for_baccalaureate_degrees82410.html)
7 [ml](http://www.csusm.edu/policies/active/documents/graduation_requirements_for_baccalaureate_degrees82410.html)), from which the catalog copy (on page 100 of the 2010-21012 General Catalog) is drawn.

8 The text as posted on the Policy and Procedures website follows immediately below. Proposed changes are
9 indicated using track changes.

10 **Procedure**

11 **I. UNIT REQUIREMENT**

12 Every baccalaureate degree requires completion of a minimum of 120 semester units. Some choices of majors will
13 require more than 120 semester units; the descriptions of each major specify how many units are required.

14 At least forty (40) units shall be in upper-division credit and no more than seventy (70) units may be transferred
15 from a community college.

16 **II. MAJOR REQUIREMENTS**

17 Every baccalaureate degree must include an approved major. A major for a Bachelor of Arts degree must include
18 at least twenty-four (24) units exclusive of units used to meet the General Education requirement and a major for
19 a Bachelor of Science degree must include at least thirty-six (36) units exclusive of units used to meet the General
20 Education requirement. For a Bachelor of Arts degree, at least twelve (12) units required in the major shall be
21 upper-division courses, and for a Bachelor of Science degree, at least eighteen (18) units required for the major
22 shall be upper-division. Most majors require more than these minima.

23 **III. MULTIPLE MAJORS**

24 It is possible for a student to complete more than one major within one degree (for example, a B.A.). Each major
25 after the first major must consist of at least 24 semester units that are ~~completely separate and distinct from~~
26 ~~the~~ not counted toward any other majors ~~major's requirements and General Education~~. To be recognized as
27 graduating with multiple majors, a student must declare the additional major(s) with the appropriate discipline or
28 program no later than the beginning of the student's final year of study. The completion of additional majors
29 within one degree will be noted at the time of graduation by appropriate entries on the student's transcript and on
30 the diploma. Majors appear on the diploma in the order in which the student has designated them to be the first
31 major, second major, etc.

32 It is also possible for a student to complete a major (or majors) in one degree concurrently with additional majors
33 from a different degree (for example, a major in a B.S. concurrently with another major from a B.A.). Each major
34 after the first major must consist of at least 24 semester units that are ~~completely separate and distinct from~~
35 ~~the~~ not counted toward any other majors ~~major's requirements and General Education~~. By declaring which major
36 is the first major, second major, etc., the student also declares the order in which the degrees, and the majors
37 leading to these degrees, appear on the diploma and transcript. Students must make this declaration no later than
38 the beginning of the student's final year of study.

39 **IV. MINORS**

40 An undergraduate student may elect to complete one or more minors; this is not a degree requirement. Unless the
41 description of the major(s) and minor contain additional stated restrictions, there is no restriction on double-
42 counting units in the major(s) and the first minor that a student declares. After the first minor, each subsequent
43 minor must contain twelve units beyond those used for major requirements and other minors. Students may not
44 declare or receive a minor in the same subject or title as the major. ~~Unless the description of the major(s) and~~
45 ~~minor contain additional stated restrictions, there is no restriction on double counting units in the major(s) and~~
46 ~~the first minor that a student declares.~~ Minors are awarded as part of a baccalaureate degree. The completion of
47 a minor will be noted on the student transcript, but not on the diploma.

48 **V. ACADEMIC CERTIFICATES & CERTIFICATE PROGRAMS**

49 Cal State San Marcos grants certificates to individuals who complete certificate programs that enhance major
50 requirements or credential programs. A certificate is issued upon the successful completion of an academic

51 certificate program. The university acknowledges the completion of a certificate by recording it on the student
52 transcript, but not on the diploma.

53

54 Explanation of Changes:

- 55 • The first change is rephrasing the requirement on additional units necessary for a second or a third major.
56 Stating the rule in terms of the additional majors requiring units above those of the first major is a simpler
57 statement of the older 'completely separate and disjoint' requirement. This is an editorial change.*
- 58 • A second change is deleting references to General Education from this statement, since the General
59 Education Committee is the Senate committee (not APC) that is supposed to develop General Education
60 policy. See the paragraph below on a suggested referral to the GEC.
- 61 • Changing the placement of this sentence makes this paragraph much more readable. This is an editorial
62 change.*

63 * The significance of gaining approval for these editorial changes is that the text of this "Procedure" is reproduced
64 verbatim in the catalog (see pages 100 and 101 in the 2010-2012 General Catalog).

65 **Procedure**

66 I. No student may use a course from their major area, or any course cross-listed with their major area, to satisfy
67 upper division general education (UDGE) requirements BB, CC, DD.

68 II. For interdisciplinary majors with a primary field, students are prohibited from using courses in their primary
69 field or any course cross-listed with their primary field. For majors in which students take courses from a variety of
70 fields and no primary field is named, students are not prohibited from taking courses in these fields. (E.g., Human
71 Development majors take courses in Biological Sciences, Psychology, and Sociology. They are not prohibited from
72 taking courses that are cross-listed with these fields.)

73

74

2
3 **Rationale:** *The primary purpose for this revision is in response to PLC concerns that language regarding*
4 *proposals and categories be clarified because existing language in the sabbatical policy was not specific*
5 *enough with regard to proposals that are funded and those that are not. For example, page 4, line 154*
6 *through 163 has been changed to reflect **recommended** proposals or unusually good or timely*
7 *opportunities. There would be an expectation that all of the recommended proposals would be funded.*
8 *The second category is **conditionally recommended** with proposals indicating a high quality faculty*
9 *project with funding based on availability of resources. Finally the last category: **not recommended***
10 *reflecting proposals that do not indicate a high-quality sabbatical leave project. Recent history indicates*
11 *these changes originating from individuals whose recommended proposals were not funded. The*
12 *clarification in 3 b. or line 158 where we specify conditionally recommended contingent upon the*
13 *availability of resources will better indicate to individuals the possibility that their sabbatical projects may*
14 *not be funded. In a few other places in the document specifically lines 105, 174, and line 178 add faculty*
15 *recommended or conditionally recommended to the language for consistency throughout the rest of the*
16 *document. You can find these changes also in lines 208 and line 214. Finally, in reviewing the documents,*
17 *the faculty affairs committee noted language that can be updated to better reflect the CSUSM mission in*
18 *regard to 21st century higher education and recommends making gender neutrality adjustments in our*
19 *documents as they are reviewed. For example the use of the "word" s/he can be considered antiquated and*
20 *so in the cases where the word shows up we have changed the word to 'the individual.'* And in places
21 *where his/her appears, we have adjusted the sentence to be more inclusive and gender-neutral.*
22
23

Definition: A policy governing the application for and award of sabbatical leaves.
Authority: The collective bargaining agreement between the California State
University and the California Faculty Association.
Scope: Eligible faculty unit employees of CSU San Marcos.

24
25 I. AUTHORIZATION

26
27 Sabbatical leaves are authorized under Article 27 of the Collective Bargaining Agreement.
28

29 A. II. OBJECTIVE

30
31 Sabbatical leaves shall be for purposes that provide a benefit to CSUSM through scholarly
32 research, scholarly and/or creative activity, instructional improvement and/or faculty
33 retraining. Such activities provide a crucial benefit to the instructional needs of CSUSM by
34 improving the competency and enthusiasm of the faculty, by keeping the faculty up-to-
35 date in their fields, and by bringing new ideas and concepts to the campus which will be
36 shared with students and other faculty in and out of the classroom. Sabbatical activities
37 also benefit society and promote the reputation of the university by giving CSUSM faculty a
38 chance to refine ideas developed at CSUSM and spread them to the national and
39 international creative, scholarly and educational communities.
40

41 III. ELIGIBILITY

42
43 A full-time faculty unit employee shall be eligible for sabbatical leave if:

- 44
45 1. ~~S/he~~The individual has served full-time for six (6) years at CSU, San Marcos in the
46 preceding seven (7) year period prior to the leave; and

- 47
48 2. ~~S/he~~The individual has served full-time at least six (6) years after any previous
49 sabbatical leave or difference in pay leave¹.
50

51 *Note:*

- 52 A. Credit granted towards completion of the probationary period for service elsewhere
53 shall also apply towards fulfilling the eligibility requirements for sabbatical.
54
55 B. A leave of absence without pay or service on an academic administrative
56 appointment excluded from the bargaining unit shall not constitute a break in
57 service for eligibility requirements.
58
59 C. For tenure track faculty, final approval of a sabbatical leave is contingent upon
60 having earned tenure.
61

62 IV. SALARY

63
64 The salary of a faculty employee on a sabbatical leave shall be in accordance with the
65 following:
66

- 67 1. One (1) semester at full salary; or
68
69 2. Two (2) semesters at one-half (1/2) the full salary.
70

71 V. SSP-ARs

72
73 All full time SSP-ARs are eligible to apply for sabbaticals.
74

75 The process for SSP-ARs will be the same as it is for instructional faculty with the following
76 exceptions:
77

78 The Professional Leave Committee will evaluate the applications separately from the
79 instructional faculty and assign them to one of the categories identified in Section VII. C.
80

81 The Professional Leave Committee will submit their report to the Vice President for
82 Student Affairs instead of the Vice President for Academic Affairs.
83

84 VI. APPLICATION PROCESS

- 85
86 A. Sabbatical leaves are awarded the year prior to the sabbatical leave itself. Each
87 spring semester, faculty who are eligible to apply for a sabbatical leave shall be
88 notified of their eligibility and the application submission date for the Fall semester.
89 A copy of the notification shall be sent to the Dean and the Department Chair or

¹Difference in Pay Leaves. Academic employees who have completed at least six consecutive academic years of service may be granted a leave of absence for one or more semesters not exceeding one year, with compensation equal to the difference in salary between that received by the person on leave and minimum salary of the instructor rank.

90 equivalent². In order to facilitate resource planning, faculty are asked to notify the
91 Dean and Department Chair (or equivalent) as soon as they make the decision to
92 apply for a sabbatical leave.

93
94 B. An application for a sabbatical leave shall include the following:

95
96 1. A 3 to 5 page narrative which states the purpose of the sabbatical leave and
97 gives a detailed description of the applicant's plan of scholarly research or
98 creative activity, instructional improvement and/or faculty retraining~~study,~~
99 ~~research, travel, and/or service~~. This narrative shall include the following:

100
101 a. A full description of the proposed activities including a timeline, and,
102 ~~if appropriate,~~ a description of the methodology, and/or course of
103 study (or other types of activities). The activities proposed should be
104 of a nature to clearly make full use of the applicant's working time
105 for the duration of the sabbatical leave.

106
107 b. An explanation of how the project positively impacts the applicant's
108 professional development (including the ability to carry out
109 responsibilities at CSUSM). The applicant should put the
110 professional development into context. For example, if the
111 proposed activity involves a course of research, the applicant should
112 explain whether it represents a continuation of ongoing research or
113 a change in direction; likewise, if the proposed activities are directed
114 at instructional improvement, the applicant should describe the
115 courses which will benefit and how they will benefit from the
116 proposed activities.

117
118 2. A statement specifying the CSU resources (e.g., the need to use one's
119 faculty office/lab, the need to secure an internal grant, or the need for travel
120 funds), if any, necessary to carry it out;

121
122 3. A statement of the time requested, which shall not exceed one (1) year;

123
124 Note: A sabbatical leave of two (2) semesters may be implemented within a
125 two (2) consecutive year period.

126
127 4. A copy of the applicant's curriculum vitae and a copy of original reports for
128 previous sabbatical leaves (see Section IX, Paragraph D VIII, Paragraph 4
129 below).

130
131 5. Applicants who have been recommended or conditionally recommended
132 for a sabbatical but not funded in any of the previous two years may also
133 include copies of previous recommendations from the Professional Leave
134 Committee for one or both of the previous two years.

135

² A faculty member not belonging to a "department" has an appropriate administrator, for example a Center Director or a Program Director, who functions as the equivalent of the Department Chair for the purposes of this document.

- 136 C. The application (9 copies) shall be submitted to the Professional Leave Committee
137 via the Office of the Academic Senate. The Office of the Academic Senate shall
138 distribute seven copies to the Professional Leave Committee, one copy to the
139 Associate Vice President for Academic Affairs - Academic Resources office and one
140 copy to the applicant's department (or equivalent unit).
141
142 D. A difference in pay leave may be filed simultaneously with a request for a sabbatical
143 leave according to academic unit policy and procedures but only one type of leave
144 may be granted.
145

146 VII. EVALUATION PROCESS
147

148 A. **A Professional Leave Committee shall review sabbatical applications,**
149 **considering questions related to the quality of the proposed sabbatical leave**
150 **project.**
151

- 152 1. The Professional Leave Committee shall be constituted as follows:
153
154 a. The Professional Leave Committee shall be elected on an annual
155 basis by probationary and tenured faculty unit employees.
156
157 b. The Professional Leave Committee shall be an all university
158 committee composed of full-time tenured professors.
159
160 c. ~~One NEAC will determine the number of members from each unit as~~
161 ~~appropriate. At least one member shall be elected from the~~
162 ~~faculty by the eligible faculty in each of the following areas:~~
163 ~~Education, Business, Science and Mathematics, Humanities and~~
164 ~~Fine Arts, the Social Sciences, college and the Library by the eligible~~
165 ~~faculty.- The distribution of areas shall parallel the University~~
166 ~~Retention, Tenure, and Promotion committee. One at-large~~
167 ~~representative shall be elected from the faculty as a whole.³~~
168
169 d. Faculty unit employees applying for a sabbatical leave shall not be
170 eligible for election to the Professional Leave Committee.
171
172 2. The Professional Leave Committee shall use the following criteria listed in
173 order of importance in evaluating the merit of applications proposals:
174
175 a. The quality of the professional development of the applicant
176 through scholarly research or creative activity, instructional
177 improvement and/or faculty retraining research, scholarly and
178 ~~creative activity, instructional improvement or faculty renewal with~~
179 ~~no implied priority among these (including the impact on the faculty~~
180 ~~member's ability to carry out his/her responsibilities to CSUSM).~~
181

³The distribution of areas was chosen to parallel the University Retention, Tenure, and Promotion committee.

182 b. The quality of the application proposal in terms of clarity, purpose,
183 methods, and objectives.

184
185 3. The Professional Leave Committee shall group applications proposals into
186 the following categories:

187
188 a. Highly Recommended: Applications Exceptionally Proposals that
189 indicate exceptionally high quality projects. Additional
190 consideration will be given to projects that are or projects which
191 represent an unusually good or timely opportunity opportunities.
192 The expectation is that all Recommended applications proposals will
193 be funded.

194
195 b. Conditionally Recommended: Applications Projects Proposals that
196 indicate a high quality sabbatical leave projects. The expectation is
197 that fFunding of these Conditionally Recommended applications
198 proposals is will be based on the availability of resources.

199
200 c. Not Recommended-Against: Applications Projects Proposals that
201 do not indicate a high quality sabbatical leave projects.

202
203 The Professional Leave Committee shall recommend against all
204 applications proposals whose proposed activities are not of a nature to
205 account for all of the applicant's working time for the duration of the
206 sabbatical leave.

207
208 The *Highly Recommended* category should be a small, select group. In no
209 case should more than 25% of the proposals be assigned to this category.

210
211 4. The Professional Leave Committee shall rank order all applications in the
212 Conditionally Recommended Category (this information will not be included
213 in the letter sent to the applicant).

214
215 5. The Professional Leave Committee shall submit a letter for each application
216 to the Vice President for Academic Affairs giving the following information
217 (a) the category of recommendation (Highly Recommended, Conditionally
218 Recommended, or Not Recommended-Against), (b) the reasons for the
219 recommendation, and (c) suggestions for improvement (if needed) Not
220 Recommended. The Professional Leave Committee shall also submit to the
221 Vice President for Academic Affairs the rank order of applications in the
222 category.

223
224 A copy of this letter shall be given provided to the applicant. The applicant
225 shall be informed ~~that a positive that a~~ recommendation by the Professional
226 Leave Committee does not guarantee that the Sabbatical Leave will be
227 approved by the President.
228

229 **Applicants may respond in writing to the VPAA regarding the**
230 **committee's recommendation within two weeks of receipt of the**
231 **recommendation.**
232

233 B. The Senate Office shall send a copy of the application to the faculty unit employee's
234 department (or equivalent unit). The department (or equivalent unit) shall provide
235 a statement to the Vice President for Academic Affairs (with a copy to the Dean)
236 regarding the possible effect on the curriculum and the operation of the
237 department (or equivalent unit) should the employee be granted a sabbatical.
238

239 C. The Vice President for Academic Affairs shall make a recommendation to the
240 President regarding each sabbatical leave application.
241

- 242 1. After reviewing the recommendations of the Professional Leave
243 Committee, the Vice President for Academic Affairs may meet and confer
244 with the Professional Leave Committee for clarification.
245
- 246 2. The Vice President for Academic Affairs, in consultation with the
247 appropriate deans, shall consider other campus program needs and campus
248 budget implications. In particular, the distribution of sabbatical leaves
249 among different academic units may be considered (taking into account
250 such factors as the FTES, FTEF, number of eligible faculty, number of
251 faculty applying, and the number of faculty recommended or conditionally
252 recommended by the Professional Leave Committee in each unit).
253
- 254 3. When resources do not allow funding of all sabbatical leaves of a given
255 category or subcategory of recommendation, the Vice President for
256 Academic Affairs shall also take into account the number of years (since the
257 applicant's previous sabbatical leave, if any) an applicant has been eligible
258 for sabbatical leave as well as the number of years the applicant has been
259 recommended or conditionally recommended for a sabbatical leave by the
260 Professional Leave Committee, but not awarded.
261
- 262 4. Arrangements may be developed by the department and approved by the
263 President to accommodate granting sabbatical leaves for faculty unit
264 employees whose leaves have been approved. Such arrangements may
265 include rearranging workload within the department, and other university
266 funding. No faculty unit employee will be involuntarily required to work in
267 an overload situation by such arrangements.
268
- 269 5. The recommendation of the Vice President for Academic Affairs shall be
270 forwarded to the President with copies to the applicant, the Dean, the
271 department (or equivalent), and the Professional Leave Committee. The
272 letter should contain reasons for the recommendation.
273

274 B. VIII. APPROVAL
275

276 A. The President or the President's designee shall respond in writing to the applicant
277 and shall include the reasons for approval or denial. If a sabbatical leave is granted,

278 the response shall include any conditions of such a leave. A copy of this response
279 shall be provided to the affected department (or equivalent unit), the Dean, the
280 Vice President for Academic Affairs and the Academic Senate Office for the
281 Professional Leave Committee.
282

- 283 B. Final approval of a sabbatical leave shall not be granted until the applicant has filed
284 with the President a suitable bond or an accepted statement of assets (not
285 including PERS holdings) and/or a promissory note that is at least equal to the
286 amount of salary paid during the leave.
287
- 288 C. The guarantee posted shall indemnify the State of California against loss in the
289 event the employee fails to render the required service in the CSU following return
290 of the employee from the sabbatical leave.
291
- 292 D. The guarantee posted shall immediately be canceled in full upon completion of
293 required service or upon waiver of that service by mutual agreement of the faculty
294 member and the CSU.
295
- 296 E. A faculty unit employee whose leave requested has been approved shall normally
297 be granted that leave. A leave may be deferred up to one year in circumstances
298 when the President or the President's designee determines that granting the
299 sabbatical leave in the succeeding academic year would cause an undue hardship
300 on the department's ability to offer its program.
301

302 IX. FACULTY RESPONSIBILITIES 303

- 304 A. A faculty unit employee on a sabbatical leave shall not accept additional and/or
305 outside employment without prior approval of the president or the President's
306 designee.
307
- 308 B. A faculty unit employee granted a sabbatical leave may be required by the
309 president to provide verification that conditions of leave were met. The statement
310 of verification shall be provided to the president and the Academic Senate office for
311 the Professional Leave Committee.
312
- 313 C. A faculty unit employee shall render service to the CSU upon return from a
314 sabbatical leave at the rate of one (1) term of service for each term of leave.
315
- 316 D. A faculty member, upon return from sabbatical, shall submit a written report of
317 approximately one page to the department (or equivalent unit) and Dean
318 describing accomplishments during the period of leave.
319

320 X. FACULTY RIGHTS 321

- 322 A. It is the intent of this policy that faculty unit employees eligible for sabbatical leave
323 who meet the conditions of this policy receive their sabbatical leave.
324
- 325 B. Faculty on a sabbatical leave may not serve on university-wide committees.
326 However, faculty on a sabbatical leave may vote in university-wide elections and

run for university-wide offices for which they are eligible. The voting rights and committee service restrictions of an individual on sabbatical, within their college, department, or program, should be decided by the college/department/program and included in pertinent governance documents.

- C. A faculty unit employee on a sabbatical leave shall be considered in work status and shall receive health, dental, and appropriate fringe benefits provided by the CSU in the same manner as if ~~she~~the individual were not on a sabbatical leave.
- D. A faculty unit employee on a sabbatical leave shall be entitled to accrue sick leave, vacation, and service credit toward merit salary adjustment, eligibility toward promotion, if applicable, and seniority credit.
- E. If approved leaves are deferred, in succeeding years first preference for leave shall be given to faculty whose leave applications were approved in the earliest prior year.

XI. TIMELINE

May of year before request process begins

- Associate Vice President for Academic Affairs - Academic Resources notifies eligible faculty
- NEAC constitutes the Professional Leave Committee.

Last business day of September

- 9 copies of application due in Office of the Academic Senate. (Senate provides 1 copy to Associate Vice President for Academic Affairs and 1 copy to the department (or equivalent unit))

First business day of October

- Associate Vice President for Academic Affairs - Academic Resources requests impact statement from the department (or equivalent unit)

Last business day of October

- Professional Leave Committee forwards recommendations to Vice President for Academic Affairs with a copy to applicant
- Impact statements due to Vice President for Academic Affairs with a copy to applicant

Last business day of November

- ~~— Vice President for Academic Affairs forwards recommendation to President with copies to the department (or equivalent unit), the Dean, the Office of the Academic Senate for the Professional Leave Committee and the applicant.~~

Last day of Fall semester

- President or designee notifies candidates of sabbatical decisions with copies to the department (or equivalent unit), the Dean and the Office of the Academic Senate for the Professional Leave Committee

2
3 **Rationale:** *The governing body of the California State University San Marcos (CSUSM) College of*
4 *Education (CoE) has revised the retention, tenure, and promotion (RTP) document to reflect standards*
5 *pursuant to the current Academic Senate approved RTP standards (May, 2010). This document is*
6 *additionally informed by the process suggested by Guidelines for Department RTP Standards approved by*
7 *Academic Senate May, 2009. These standards are specific to the retention, tenure, and promotion of*
8 *tenure line faculty in the College of Education.*

9
10 **Definition** *Standards governing RTP process for faculty in the CoE.*

Authority *The collective bargaining agreement between the California State University and the California*
Faculty Association.

Scope *Eligible CoE faculty at California State University San Marcos.*

11 **I. COE RTP STANDARDS**

12
13 A. Preamble

- 14
15 1. This document sets forth general standards and criteria for retention, tenure, and
16 promotion of full-time faculty in the College of Education.
17
18 2. The provisions of this document are to be implemented in conformity with University RTP
19 Policies and Procedures; the CSU Collective Bargaining Agreement (CBA), Articles 13, 14,
20 15; and the University Policy on Ethical Conduct.
21
22 3. The College is guided also by the standards of the National Council for Accreditation of
23 Teacher Education (NCATE), American Speech Language Hearing Association (AASHA),
24 and the national accrediting agency for colleges and departments of education and
25 California Commission on Teacher Credentialing (CCTC).

26
27 B. Definitions of Terms and Abbreviations

- 28
29 1. The College of Education (CoE) uses the same definitions, terms, and abbreviations as
30 defined in the University RTP document. For clarity, the use of "is" is informative, "shall" is
31 mandatory, "may" is permissive, "should" is conditional, and "will" is intentional.
32
33 2. A "standard" is a reference point or formalized expectation against which progress can be
34 measured for retention, tenure, and promotion.
35
36 3. Faculty have a right to clearly articulated performance expectations. Departmental and
37 College RTP Standards provide consistency in guiding tenure-track faculty in the
38 preparation of their working personnel action files (WPAFs).
39
40 4. Department and College RTP Standards educate others outside of the discipline, including
41 deans, university committees, and the provost, with respect to the practice and standards
42 of a particular department/discipline/field.
43
44 5. Departments and Colleges must respect the intellectual freedom of their faculty by
45 avoiding standards that are too prescriptive. Department and College standards should be
46 as brief as possible with emphasis on the unique nature of the department.
47

48 6. All Department and College RTP Standards shall conform to the CBA and University and
49 College RTP documents. The CoE RTP Standards document shall contain the elements of
50 College RTP standards described below and shall not repeat the CBA, or College RTP
51 documents, or include college-specific advice.

52
53 7. All Department or College RTP Standards must be approved by a simple majority of all
54 tenure-track faculty within a department or college and then be approved by
55 college/school/library and the Academic Senate before any use in RTP decisions.

56

57 **II. ELEMENTS OF THE CoE RTP DOCUMENT**

58

59 **A. Introduction and Guiding Principles**

60

61 1. All standards and criteria reflect the University and College Mission and Vision Statements
62 and advance the goals embodied in those statements.

63

64 2. The performance areas that shall be evaluated include scholarly teaching, scholarly
65 research/creative activities, and scholarly service. While there will be diversity in the
66 contributions of faculty members to the University, the College affirms the university
67 requirement of sustained high quality performance and encourages flexibility in the relative
68 emphasis placed on each performance area. Candidates must submit a curriculum vita (CV)
69 and narrative statements describing the summary of teaching, research/ creative activity,
70 and service for the review period. The faculty member must meet the minimum standards
71 in each of the three areas.

72

73 3. Items assessed in one area of performance shall not be duplicated in any other area of
74 performance evaluation. Items shall be cross-referenced in the CV, narrative statements,
75 and WPAF to demonstrate connections across all three documents. Candidates who
76 integrate their teaching, research/creative activities, and/or service may explain how their
77 work meets given standards/criteria for each area.

78

79 4. The College recognizes innovative and unusual contributions (e.g., supervising research,
80 using particularly innovative or challenging types of pedagogy, writing or rewriting
81 programs, curriculum development, assessment development, accreditation or other
82 required report generation).

83

84 5. Retention, tenure, and promotion decisions are made on the basis of the evaluation of
85 individual performance. Ultimate responsibility for understanding the standards, meeting
86 the standards, and effectively communicating how they have met the standards rests with
87 the candidate. In addition to this document, the candidate should refer to and follow the
88 University RTP Policies and Procedures. Candidates should also note available
89 opportunities that provide guidance on the WPAF and describe the responsibilities of the
90 candidate in the review process (e.g., Provost's RTP meetings; Faculty Center Professional
91 Development, and advice and counsel by tenured faculty. Candidates are encouraged to
92 avail themselves of such opportunities.

93

94 6. Candidates for retention will show effectiveness in each area of performance and
95 demonstrate progress toward meeting the tenure requirements in the areas of scholarly
96 teaching, scholarly research/creative activities, and scholarly service.

97

- 98 7. Candidates for the rank of associate professor require an established record of
99 effectiveness in scholarly teaching, scholarly research/creative activities, and scholarly
100 service to the College and University.
101
- 102 8. Candidates for the rank of professor require, in addition to continued effectiveness, an
103 established record of initiative and leadership in scholarly teaching, scholarly
104 research/creative activities, and scholarly service to the College, University, community,
105 and profession. Promotion to the rank of professor will be based on the record of the
106 individual since promotion to the rank of associate professor.
107
- 108 9. The granting of tenure at any rank recognizes accomplishments and services performed by
109 the candidate during the individual's career. The record must show sustained and
110 continuous activities and accomplishments. The granting of tenure is an expression of
111 confidence that the faculty member has both the commitment to and the potential for
112 continued development and accomplishment throughout the individual's career. Tenure
113 will be granted only to individuals whose record meets the standards required to earn
114 promotion to the rank at which the tenure will be granted.
115

116 III. GENERAL STANDARDS 117

- 118 A. **Retention:** A positive recommendation for retention requires that the candidate's record
119 clearly meets the articulated standards for the granting of a retention decision in each of the
120 three areas: scholarly teaching, scholarly research/creative activities, and scholarly service.
121
- 122 B. **Tenure and/or Promotion:** A positive recommendation for tenure or promotion requires that
123 the candidate's record clearly meets the articulated standards for the granting of a
124 tenure/promotion decision in each of the three areas: scholarly teaching, scholarly
125 research/creative activities, and scholarly service.
126
- 127 C. **Early Tenure (prior to the 6th year in rank):** *This option for assistant professors* is considered
128 an exception. A positive recommendation for early tenure requires that the candidate's record
129 clearly meets the articulated standards for the granting of a tenure/promotion decision in ALL
130 areas. To be eligible for early tenure, a candidate must show a sustained record of successful
131 experience at a university, and that experience must include at least one full year at California
132 State University San Marcos prior to the year of review for tenure.
133
- 134 D. **Early Promotion (prior to the 6th year in rank):** *This option for associate professors* is
135 considered an exception. A positive recommendation for early promotion requires that the
136 candidate's record clearly meets the articulated standards for the granting of a
137 tenure/promotion decision in ALL areas. To be eligible for early promotion a candidate must
138 show a record of successful experience at a university, and that experience must include at least
139 one full year at California State University San Marcos prior to the year of review for promotion.
140
- 141 E. Faculty who are hired at an *advanced rank without tenure* may apply for tenure after two years
142 of service at CSUSM (i.e., in fall of their third year at CSUSM). A positive recommendation
143 requires that the candidate's record at CSUSM clearly demonstrates a continued level of
144 accomplishment in all areas and, together with the candidate's previous record, is consistent
145 with the articulated standards for the granting of tenure at the faculty member's rank.
146

147 IV. STANDARDS AND CRITERIA FOR SCHOLARLY TEACHING 148

149 A. College Priorities and Values in Teaching and Learning

- 150
- 151 1. In the College of Education, “effective Scholarly Teaching” is defined as activity that
- 152 promotes student learning, reflection, and professional growth in support of the College
- 153 Mission and is demonstrated by information in the teaching portfolio section of the WPAF.
- 154 Scholarly teaching in the CoE should explicitly support the Mission Statement. Scholarly
- 155 teaching is multifaceted and may include instructional activity that takes place at off-site
- 156 locations.
- 157
- 158 2. The most important teaching activities include, but are not limited to:
- 159 • Classroom modality, face-to-face, blended, online, on-campus, off-site, distance
 - 160 learning teaching
 - 161 • Supervision of teacher candidates
 - 162 • Supervision of masters theses or projects and doctoral dissertations and research
 - 163 • Supervision of student independent study
 - 164 • Training and/or supervision of lecturers, colleagues, and Distinguished Teachers in
 - 165 Residence (DTiR)
 - 166 • Student advising and counseling
 - 167 • Laboratory teaching
 - 168 • Clinical teaching/ practice
 - 169 • Seminar courses
 - 170 • Undergraduate and graduate courses
 - 171 • Supervision of field work and independent research
 - 172 • Supervision of teaching and graduate assistants
- 173
- 174 3. As a college that primarily focuses on preparing students to become effective educators, it
- 175 is expected that the faculty in the College of Education will consistently model effective
- 176 instructional practices and continue to improve as an educator. Effective faculty members
- 177 set clear student learning outcomes for their students, employ a range of instructional
- 178 strategies, and teach in ways that effectively engage all students in the learning process.
- 179
- 180 4. CoE approaches to support excellent teaching include collaboration, team teaching, lesson
- 181 study groups, and co-teaching.
- 182
- 183 5. Evaluations of scholarly teaching will focus on determining a profile of the candidate's
- 184 teaching effectiveness. To determine such a profile, scholarly teaching will be assessed by
- 185 holistic evaluation of evidence, including candidates’ reflective statement on teaching,
- 186 student evaluations, reflective practice, and selected items that the candidates believe best
- 187 represent their teaching, as described in the University RTP document and further
- 188 illustrated below in section B.
- 189

190 B. The Following Evidence of Scholarly Teaching is **required**:

191 1. Scholarly Teaching Reflective Statement

192

193

194 A reflective narrative including any selected items from section IV. A .2. (p. 4 above) and all

195 scholarly teaching evidence discussed in the file should reflect continued success and/ or

196 improvement in teaching. In this statement, candidates shall provide a clear and concise

197 reflective self-assessment of their teaching philosophy, experience, and performance. The

198 reflective statement may include the candidates’ philosophy of teaching and learning,

199 pedagogical connections between the techniques they employ when teaching and their
 200 philosophy of teaching and learning, impact of any notable teaching accomplishments or
 201 awards, improvements made as a result of lessons learned from their teaching and/or
 202 student evaluations, impact of course innovation or development, and/or their approach to
 203 supervision of student teachers. As part of the reflective statement, candidates shall
 204 provide a brief summary of student evaluation ratings exemplifying scholarly teaching
 205 supported by a brief discussion of these evaluations. Evaluation ratings and narrative shall
 206 specify rationale for categories chosen (e.g., quality of course, instructor preparedness,
 207 active learning encouraged) and particular teaching context (e.g., new prep, co-taught,
 208 curriculum modifications, extenuating circumstances). Course evaluations and narrative
 209 should reflect evidence of improvement in evaluations.

210
 211 2. Teaching and/or Supervision Assignments

212
 213 **Evidence:** If not already a part of the curriculum vita, candidates will list all courses and/or
 214 all student teaching supervision assignments for the period under review, as illustrated
 215 below.

Semester & Year	Course Number	Course Title	Section	Units	Number of Students Enrolled	Comments	Evaluation Ratings (specify categories/items referenced)

217
 218 3. Student Evaluations from Teaching and/or Supervision Assignments

219
 220 **Evidence:** Provide complete sets of (60% [percentage as specified by CBA]) university-
 221 prepared student evaluation reports, from courses taught and/or student teacher
 222 supervision assignments since the last promotion.

223
 224 4. Representative Syllabi from Courses Taught

225
 226 **Evidence:** Provide a representative sample of syllabi from core courses taught since last
 227 promotion that illustrate course objectives, student learning outcomes, sample
 228 assignments, and current practice in the field and instructional practices.

229
 230 C. The Following Evidence of Scholarly Teaching is *Optional*:

231
 232 1. Use of Exemplary Teaching Practices in Coursework and/or Clinical Practice

233
 234 **Evidence:** Provide evidence that illustrates the use of exemplary teaching practices.
 235 Candidates might provide evidence that demonstrates the effective use of such things as
 236 technology, teaching strategies for diverse learners, student projects, student learning
 237 outcomes, portfolios, etc.

238
 239 2. Curriculum, Program, and/or Course Development and/or Revision

240
 241 **Evidence:** Provide evidence that illustrates any new developments or improvements in
 242 curriculum, programs, and/or courses. Evidence might include a brief description of
 243 improvements, curriculum forms, syllabi changes, links to online materials, etc.

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3. Academic Advising

Evidence: Provide evidence of effective academic advisement of students and the impact of this work. Academic advisement includes the many ways the candidate supported students in their academic pursuit, such as on a thesis or dissertation committee, mentorship on a research or graduate project, or as an academic advisor to a student in a program. Evidence might include the names of the students, the role(s) the candidate played, the dates of this work, and any evidence related to the impact.

4. Other Selected Items that Best Represent Candidate’s Teaching

Evidence: Additional evidence of scholarly teaching activities not listed above, including but are not limited to:

- Assessment of student learning outcomes
- Letters from former students (identified as solicited or unsolicited)
- Teaching awards
- Other activities to promote teaching excellence (e.g., self evaluation, peer evaluation, in-service education of incumbent educators in the field)

D. Assessment of Scholarly Teaching

1. General Standards

Candidates will be assessed on the quality of the evidence provided on the set of indicators they select, rather than on the quantity of indicators selected. In all cases, candidates will be assessed on the quality and the totality of the evidence provided. When judged as a group, no one indicator may be used to determine the overall rating of teaching effectiveness.

2. Tenure and/or Promotion from Assistant Professor to Associate Professor

At the Assistant Professor level, scholarly teaching that *meets standards* is expected to demonstrate classroom effectiveness for the types of courses taught. Evidence of classroom effectiveness may include, but is not limited to student evaluations, syllabi that clearly articulate course objectives and requirements, effective instructional practices, engaging assignments directed at meeting the course objectives, documentation that illustrates clear connections throughout an entire teaching event, and assessments that effectively measure and align with student learning outcomes.

3. Tenure and/or Promotion from Associate Professor to Professor

As more experienced faculty, Associate Professors being considered for promotion to Professor are held to a higher standard. Accordingly, to be rated *meets standards*, a candidate at the Associate Professor level is expected to demonstrate leadership and initiative in teaching and curriculum related activities. This is in addition to documentation of continued teaching effectiveness (*Section IV*).

4. Retention

294 Candidates for retention shall include the required items for courses taught and additional
295 optional materials in their teaching portfolio to show evidence of efforts and effectiveness
296 in teaching. Because this is an evaluation intended to provide guidance, candidates will be
297 assessed on their current teaching performance as well as on efforts that have been made
298 to address prior performance feedback.
299

300 **V. STANDARDS AND CRITERIA FOR SCHOLARLY RESEARCH AND CREATIVE ACTIVITIES**

301

302 A. College Priorities and Values in Research and Creative Activity

303

304 In the College of Education, scholarly research/creative activities is defined as creating,
305 synthesizing, and disseminating knowledge of teaching, learning and schooling in ways that
306 fulfill the Mission and core values of the College. The College of Education encourages
307 scholarship that contributes to and transforms many communities from young to the elderly
308 (e.g., PreK-12 education, higher education; local and regional centers/ agencies), indicating
309 collaboration with multiple groups. Research involving reflective practice is valued. Sustained
310 scholarly activity that demonstrates support of the CoE Mission is expected.
311

311

312 B. College's Research/ Creative Activity Standards within Context of Discipline

313

314 Scholarly research/creative activities take many forms in the CoE. These may include, but are
315 not limited to, qualitative, quantitative, and applied scholarly research conducted both
316 individually and collaboratively. Applied scholarly research in PreK-12 schools is defined as
317 creative activity that relates directly to the faculty member's intellectual work. This type of
318 scholarship is carried out through such activities as program development, program or
319 curriculum evaluation, policy analysis, action research, collaborative research with educators
320 and community members, etc. These activities are tied directly to the professor's special field
321 of knowledge and are aimed at substantive change in educational practices. Applied scholarly
322 research requires rigor and accountability.
323

323

324 C. Faculty Description of Contributions when Multiple Authors are Present

325

326 When multiple authors are present on scholarly research and creative activities, candidates
327 shall specify their specific role on item (e.g., role: first author; second author; equal authorship;
328 etc.).
329

329

330 D. Major Challenges facing faculty in the CoE in terms of limitations

331

332 Faculty members in the College of Education may experience challenges based on the
333 perceptions of outside disciplines in terms of scholarly research and creative activity, when
334 applied research or action research is mostly qualitative in nature. They may also experience
335 limitations when colleagues from other disciplines do not understand that CoE scholarly
336 activity includes evaluation of new programs, participation in accreditation activities, or
337 participation in large-scale research efforts. Finally, when budgetary constraints prohibit CoE
338 faculty from traveling to disseminate research findings at national or international conferences,
339 scholarly presentations may more often be local.
340

340

341 E. Evidence of Scholarly Research and Creative Activities

342

343 Evaluations of scholarly research/creative activities will focus on developing a profile of the
344 candidate's scholarly research/creative activities as well as an understanding of the impact and

benefit their work has had on the field, including the PreK-12 community. To determine such a profile, the candidate's scholarly research/creative activities will be assessed by *holistic* evaluation of the candidates' reflective statement, scholarly work, and selected items that the candidates believe best reflects their progress, as described in the University RTP document and further illustrated below.

1. Scholarly Research/Creative Activities Reflective Statement

Candidates shall provide a clear reflective assessment of scholarly research/ creative activities as well as the impact of this work. The reflective statement may also include short-term and long-term goals for research/ creative activities, connections between research/ creative activities and the courses taught, and the impact of research/ creative activities.

a. **Category A Evidence** must include external peer review process:

- 1) Papers published or accepted for publication in peer reviewed/ refereed journals recognized as reputable and of high quality
- 2) Peer or editor reviewed published book chapters of original material and original monographs
- 3) Peer or editor reviewed books, manuscripts, electronic or other media published or accepted for publication as works that contribute new knowledge and/or to practice as demonstrated by professional and academic reviewers
- 4) Peer reviewed /refereed presentations at national or international conferences
- 5) Significant program development including applied scholarship, curriculum writing, or accreditation work, which requires outside agency approval and/or peer review.
- 6) Funded peer reviewed external grants for scholarly research/creative activity work, in progress or completed

b. **Category B Evidence** may include, but is not limited to:

- 1) Papers published in refereed proceedings
- 2) Refereed presentations at professional meetings
- 3) Invited presentations at professional meetings
- 4) Editor reviewed articles published in journals, newspapers, magazines, and other media
- 5) Published case studies
- 6) Applied scholarly research/creative activity that is published, presented at a conference or meeting, or applied in an educational setting
- 7) Published review of books, articles, programs, and conferences
- 8) Session discussant at a professional meeting
- 9) Invited keynote or speaker
- 10) Special recognition and awards for research/creative activities
- 11) Funded regional or internal grants for scholarly research/creative activity work (e.g., local organizations, University Professional Development, Distinguished Teacher in Residence, etc.)
- 12) Self published books
- 13) Workshops
- 14) Unfunded peer reviewed external grants for scholarly research/creative activity work
- 15) Working papers
- 16) Submitted papers
- 17) Sponsored or contract research

396 18) Technical reports

397 19) Unfunded grants

398
399 F. Assessment of Scholarly Research/ Creative Activities

400
401 1. General Standards

402
403 Candidates will be assessed on the quality of the evidence provided, the evidence of
404 sustained scholarship, and the totality of their work. *A variety of types of work must be*
405 *provided including peer reviewed publication.* When judged as a group, no one indicator of
406 scholarly research/ creative activities may be used to determine the overall rating of quality
407 of scholarly research/ creative activities. In all cases, the scholarly reputation of the
408 publication and/or meeting will be considered when evaluating the contribution.

409
410 2. Tenure and/or Promotion from Assistant Professor to Associate Professor

- 411
412 a. At least two items by year 4 and one additional item by year 6 from Category A
413 b. At least one item per University retention review (years 2, 4, and 6) from Category B
414

415 3. Tenure and/or Promotion from Associate Professor to Professor*

- 416
417 a. At least three items from Category A
418 1) At least two items must be peer reviewed or refereed publications
419 b. At least three items from Category B
420

421 *Only items not considered in the last promotion may be considered.
422

423 4. Retention

424
425 Candidates for retention shall include documentation that may include more items in
426 Category B than A to demonstrate effectiveness in performance and demonstrate progress
427 toward meeting the tenure requirements in the area of scholarship.
428

429 **VI. STANDARDS AND CRITERIA FOR SCHOLARY SERVICE**

430
431 A. College Priorities and Values regarding Service Contributions

432
433 Consistent with our Mission Statement, the College of Education places a high value on
434 scholarly service as an essential component of faculty work. The College views activities that
435 enhance the institution and advance the profession at the local, state, national and
436 international levels as integral components of faculty service. In the College, Scholarly Service
437 is defined as activities that contribute to the life of the university, college, department or school
438 districts and/or activities that contribute to professional agencies and organizations. Service
439 activities are expected to advance the college and university mission statements.
440

441 B. Most Important College Priorities regarding Service

442
443 Evaluations of scholarly service will focus on determining a profile of the candidate's scholarly
444 service activity. To determine such a profile, service will be assessed by *holistic* evaluation of
445 the candidates' reflective statement, scholarly service work, and selected items that the
446 candidates believe best reflects their progress, as described in the University RTP document

447 and further illustrated below. Particular consideration should be given to the service necessary
448 to develop courses/programs/majors and a campus structure of a growing campus.
449

450 1. Scholarly Service Reflective Statement
451

452 Candidates are to provide a clear and concise reflective self-assessment of their scholarly
453 service activities and the impact of this work. Candidates may include statements
454 regarding any short-term and long-term goals for scholarly service activities, connection to
455 the University's and/or College's Mission, reasons for their involvement, and the impact of
456 their service activities.
457

458 2. Internal Scholarly Service Activities
459

460 a. **Evidence of Scholarly Service to the College and/or Program** may include, but is not
461 limited to:

- 462 1) Leadership/membership in college governance and/or groups that carry on the
463 business of the college (e.g., committees [elected or appointed], ad hoc
464 committees, task forces, etc.)
- 465 2) Leadership/membership in college accreditation efforts
- 466 3) Development of new courses or programs for the college
- 467 4) Program coordination and/or service (e.g., student interviews, development of
468 student learning outcomes, administration, etc.)
- 469 5) Mentoring of students, tenure-line faculty, lecturers and/or Distinguished Teachers
470 in Residence
- 471 6) Collaboration with colleagues within the college and across colleges
472

473 b. **Evidence of Scholarly Service to the CSU System and/or University** may include, but
474 is not limited to:

- 475 1) Innovative leadership initiatives at the university or CSU system level
- 476 2) Leadership/membership in groups that carry on the business of the university (e.g.,
477 committees [elected or appointed], ad hoc committees, task forces, etc.)
- 478 3) University professional activities, (e.g, service toward university accreditation, etc.)
- 479 4) Act as an advisor for a student organization
- 480 5) Commencement marshal
- 481 6) Mentoring of students, tenure-line faculty, lecturers and/or Distinguished Teachers
482 in Residence
483

484 3. External Scholarly Service Activities
485

486 a. **Evidence of Scholarly Service to the Profession** may include, but is not limited to:

- 487 1) Peer reviewer for journal or conference proposals
- 488 2) Membership on Editorial Board for peer reviewed/ refereed journal or publication
- 489 3) Leadership in professional organizations as an officer, on a committee or task
490 force, etc.
- 491 4) Consultation and expert services
- 492 5) Providing continuing education fro community
493

494 b. **Evidence of Scholarly Service to the PreK-12 and Greater Community** may include,
495 but is not limited to:

- 496 1) Assist schools, districts, or community organizations/ agencies in occasional tasks,
497 (e.g., interview committee for a school principal, academic competition judge,
498 grant or award application, textbook adoption committee, etc.)
499 2) Consulting (paid or unpaid) with schools, (e.g, presenting professional
500 development sessions, conducting research for the school or district, etc.)
501

502 4. Service Awards and Special Recognition
503

504 C. Assessment of Scholarly Service
505

506 1. General Standards
507

508 Candidates will be assessed on the evidence of the quality of evidence provided, the
509 evidence of sustained service, and the totality of their work. When judged as a group, no
510 one indicator may be used to determine the overall rating of scholarly service activity.

511 **Note:** *Submitting letters from committee chairs about attendance is not considered best*
512 *practice.*
513

514 2. Tenure and/or Promotion from Assistant Professor to Associate Professor
515

516 Candidates for promotion from Assistant to Associate Professor must provide evidence of
517 effective sustained internal and external service contributions.
518

519 3. Tenure and/or Promotion from Associate Professor to Professor
520

521 Candidates for promotion from Associate Professor to Professor must provide evidence of
522 leadership in one or more service activities in addition to demonstrating sustained active
523 participation in both internal and external service activities.
524

525 4. Retention
526

527 Candidates for retention must provide appropriate and effective evidence of significant internal
528 service. While not required, external service contribution will be considered in the evaluation.

1 | **1st reading – SAC: Student Course Grade Appeals Policy Revision**

2 |

3 |

4 | **Rationale:** This policy is updated to:

- 5 | [1] bring it in line with EO1037 implemented 8/1/2009 that replaced EO792 (main change relates to the addition of
- 6 | campus procedures for dealing with allegations of improper procedure, in addition to minor typographical changes);
- 7 | [2] clarify of the authority of the Grade Appeals Committee when it finds in favor of the appealing student; and clarify
- 8 | that grade can only stay or be increased as a result of the appeal;
- 9 | [3] allow (secure) electronic notifications, and specify procedures for keeping electronic records;
- 10 | [4] allow SGAC chair to facilitate the informal appeal;
- 11 | [5] allow a replacement of no more than two members of a consulting panel (see item VI.C.6.b)
- 12 | [6] add specific deadlines for completion of various tasks;
- 13 | [7] allow SAC (in addition to SGAC) to initiate revision to this policy and procedures;
- 14 | [8] provide a general "clean-up" (removal of references to non-existent policies, guidelines, offices, and/or positions
- 15 | and replacing these with the appropriate ones; clarification of terms and language).
- 16 |

Definition: Provides a means for students to seek redress of complaints regarding grades.

Authority: California State University San Marcos ~~Academic Freedom Statement~~ Faculty Ethics Policy, the Cal State San Marcos Interim Student Rights and Responsibilities Policy, and Executive Order ~~1037.792~~

Scope: The purpose of the Student Course Grade Appeals Policy and Procedures shall be to enable students to seek redress of complaints about course grades (hereafter referred to as "grade appeals"). A grade appeal arises when circumstances prevent assignment of an earned course grade or cause an assigned course grade to be questioned by a student. This procedure shall also be available for the resolution of grade appeals alleging inappropriate application to the student of any other rules or policies of California State University CSU-San Marcos. The burden of proof shall rest on the student.

17 |

18 | **Procedure**

19 | **I. Preamble**

20 | The California State University San Marcos Student Course Grade Appeal Policy acknowledges the rights of

21 | students and faculty as expressed in "Joint Statement of Rights and Freedoms of Students" drafted by the

22 | American Association of University Professors, the United States National Student Association, the Association of

23 | American Colleges, the National Association of Student Personnel Administrators, and National Association of

24 | Women Deans and Counselors in 1967, and the rights of all members of the campus as outlined in the California

25 | State University San Marcos Academic Freedom Statement ~~Faculty Ethics policy, the Cal State San Marcos Interim~~

26 | ~~Student Rights and Responsibilities Policy and of faculty as expressed in Executive Order 792.~~ Executive Order

27 | ~~792-1037~~ states that "faculty have the sole right and responsibility to provide careful evaluation and timely

28 | assignment of appropriate grades" and that, "in the absence of compelling reasons, such as instructor or clerical

29 | error, prejudice or capriciousness, the grade assigned by the instructor of record is to be considered final." (p. 75).

30 |

31 | **II. Purpose**

32 | The purpose of the Student Course Grade Appeal Policy and Procedures shall be to enable students to seek

33 | redress of complaints about a course grades (hereafter referred to as "grade appeals). A grade appeal arises when

34 | circumstances prevent assignment of an earned grade or cause an assigned grade to be questioned by a student.

35 | This procedure shall also be available for the resolution of grade appeals alleging inappropriate application to the

36 | student of any other rules or policies of California State University CSU-San Marcos.

37 |

38 | **III. Terms and Definitions**

39 | Throughout this document, the words, "shall," "will," and "must" refer to mandatory (required) actions. The words,

40 | "may" and "should" refer to discretionary actions (i.e., recommended or voluntary, but not required). The word

41 | "dean" refers to the dean or his/her designee. The word "principals" refers to the student appellant and the

42 | instructor respondent.

43 |

44 | **IV. Jurisdiction**

45 | This policy applies solely to students' appeals of assigned course grades. Separate grievance policies and

46 | procedures have been established for discrimination and harassment grievances. Students wishing to initiate a

47 | grievance against an administrator, faculty or staff member because of discrimination on the basis of sex, race,

48 color, national origin, age, disability, veteran status, religion, or sexual orientation are advised to obtain written
49 instructions on the filing of such grievances from the Office of Human Resources and Equal Opportunity or the
50 Office of the Dean of Students.
51 Separate policies and guidelines also exist for complaints involving Greek social service organizations or individual
52 members of a Greek Organization. These policies and guidelines may be found in the Greek Handbook available in
53 the Office of Student and Residential Life

54

55 **V. Membership**

56

57 **V.A. Committee Structure**

58 Membership of the Student Grade Appeals Committee (SGAC) shall consist of:

59 • Three students (two undergraduate, one graduate) to be named under procedures established by the Associated
60 Students Incorporated (ASI). Student members serving on this committee must be regular students in good
61 standing, as determined under the same regulations imposed for ASI Board members. Student alternates will be
62 named as needed; see section IV.E.

63 • Four faculty members and four faculty member alternates selected by the Academic Senate. All faculty
64 members of the committee and all faculty alternates must hold tenured appointments.

65 | The Chair shall be elected yearly from the faculty membership of the committee.

66

67 **V.B. Chair's Duties**

68 The Chair is non-voting except in cases of a tied vote. The Chair shall be the administrative officer of the
69 committee. The duties of the office shall include arranging for appropriate times and places of committee
70 meetings and hearings; informing committee members of the committee's standing meeting time and place, and
71 the time and place of any hearings; informing in writing all interested parties of the times and places of committee
72 meetings or hearings which they are requested to attend and supplying them with a statement of ~~alleged~~
73 ~~grievances~~ the grade appeal; informing all other interested parties that an appeal is pending; securing and
74 distributing to the committee written material appropriate for its consideration; arranging for the recording of
75 committee proceedings; maintaining committee records; and informing in writing all interested parties of the
76 recommendations of the committee.

77

78 **V.C. Service of Alternates**

79 Alternates shall be called upon as necessary to fill permanent or temporary vacancies (see section IV.E.,
80 "Vacancies."). Alternates shall serve on the committee as full voting members for grade appeal grievances.

81

82 **V.D. Terms of Service and Continuation**

83 | The term of service on the ~~Student Grade Appeals Committee~~ SGAC shall run from June 1 to May 31. All
84 committee members/ alternates shall serve two-year staggered terms, from June to May. All student members
85 shall serve one year terms. Committee members may serve consecutive terms of service.

86 The members who begin hearing an appeal shall continue as a panel for that appeal until it reaches resolution,
87 unless a member is unable to continue or is no longer eligible to serve. In the event that a particular grade appeal
88 extends beyond May 31, the members hearing that particular grade appeal shall continue with that appeal until
89 the committee's decision is rendered.

90

91 **V.E. Vacancies**

92 1. Permanent vacancies - When a permanent vacancy on the committee occurs mid-term, the Chair of the
93 committee shall request a replacement by one of the faculty alternates or, in the case of students, through an
94 appointment made by ASI. The replacement shall have full voting rights for the remaining term of office of the
95 original committee member.

96 2. Temporary vacancies - If a member of the committee is from the same immediate department or program or
97 has a close personal relationship with the student making the appeal, that member shall not participate in the
98 | appeal process for that specific ~~grievance~~ grade appeal. When, for good cause, a committee member cannot
99 consider a particular grade appeal, or if the committee identifies a conflict of interest, an alternate, with full voting
100 rights, shall be appointed to serve in his/her place for the specific grievance. In addition, a student appellant shall
101 have the right to have one member of the committee replaced with an alternate member for any reason within
102 two academic days prior to the committee's first review of the appeal. An alternate faculty member shall be
103 selected by the Chair of the committee. An alternate student member shall be appointed by ASI.

104

105 **V.F. Quorum and Voting**

106 The quorum (which must include at least one student member) for holding meetings and making grade appeal
107 | recommendations shall be a majority of the seated members of the ~~Student Grade Appeals Committee~~SGAC. A
108 majority of members in attendance, including at least two faculty members, is required to make a grade appeal
109 recommendation. Only members of the committee who have reviewed the documents submitted and heard all
110 testimony elicited during the hearing on a grade appeal may vote on the grade appeal.

111
112 **V.G. Confidentiality**

113 To protect all parties involved, all participants shall maintain confidentiality to the maximum extent possible at
114 every level of the appeal process. A breach of confidentiality is a breach of ethics, code of conduct, and FERPA.
115 No member of the committee shall discuss personal and/or pertinent information relating to a specific grade
116 appeal with any persons who are non-committee members except at the request of the committee as part of the
117 hearing processes defined in this document. This shall not preclude notification of proper authorities by the
118 Student Grade Appeal Committee in the event that the committee perceives the safety of any person or property
119 to be in jeopardy.

120 No member of the committee shall discuss personal and/or pertinent information relating to a specific grievance
121 with any of the principals throughout the course of the investigation and following the recommendation of the
122 committee except at the request of the committee and/or at a hearing.

123 | Communication Guidelines: All ~~written~~ documentation and recommendations relating to individual grade appeals
124 shall be marked and handled "confidential," and are only for the use of those directly involved in the grade appeal
125 | (interested parties). All ~~documents, tapes, etc., records~~ relevant to an individual grade appeal shall be
126 appropriately maintained for three years in locked file drawers located in the Academic Senate Office and then
127 | shredded (for physical records), or in a secure electronic location and then destroyed (for electronic records).

128 Members of the committee shall not discuss the facts of any grade appeal through electronic mail, such discussion
129 must occur when the SGAC convenes. - Notifications and other procedural correspondence may be conducted
130 electronically.

131
132 **VI. Grade Appeal Process**

133 Information and assistance for students who wish to avail themselves of the grade appeal process may obtain
134 | information and assistance from the Office of the Dean of Students, ~~or from the Associated Inc., or their faculty~~
135 advisor (as applicable). ~~Students Peer Advisor Program~~[17]. Consultants may assist with:

- 136 1) defining the basis of the appeal using the criteria specified in this procedure;
137 2) explaining the options available to the student for resolving the grade dispute;
138 3) suggesting steps toward informal resolution;
139 4) completing the grade appeal form (advice and critique) and compiling supporting documentation.
140 Consultants are expressly prohibited from writing students' grade appeals or supporting documentation.

141
142 **VI.A. Informal Process Deadlines**

143 The deadlines for completing the informal appeal process shall be as follows:

144 For courses taken during: Deadline for completion:

145 Previous fall semester March 15

146 Previous spring and summer semester October 15

147 A good faith effort to settle a dispute must be made before filing a formal grade appeal. Even after an appeal is
148 | filed, efforts to resolve the dispute by informal means should continue. SGAC Chair may facilitate the resumption
149 of the informal appeal.

150 In order to seek resolution before the formal grade appeal filing deadline, students should begin the informal
151 resolution process as soon as possible. Any grade appeal policy and procedure of a college or department is
152 considered part of the informal process, and falls within the time restrictions as discussed in Step 1 through Step 3,
153 below.

154
155 **VI.B. Informal Resolution Process**

156 The informal process consists of three steps. In order to file a formal appeal, the student shall be required to
157 submit a log of contacts, appointments (both requested and granted), and outcomes documenting his or her
158 attempts to achieve informal resolution at each step.

- 159 1. Step 1: The student must consult with the faculty member(s) involved to try to reach an agreement. If the
160 faculty member does not respond or if the student is unable to reach agreement in a reasonable length of time,
161 keeping in mind the filing deadline, then the student shall proceed to step 2.

162 2. Step 2: The student shall consult with the person at the next level of supervision if Step 1 does not result in a
163 satisfactory agreement. If the parties do not respond or reach agreement in a reasonable length of time, the
164 student shall proceed to step 3.
165 3. Step 3: The process shall continue at the level of dean, or the administrative director of equivalent rank. If the
166 dean does not respond or an agreement is not reached and the student wishes to pursue the appeal process, the
167 student shall file a formal grade appeal.
168 NOTE: Grade appeals involving administrators who have served as the instructor for the course should be directed
169 | to the ~~Student Grade Appeals Committee~~ SGAC after Step 1.

170
171 **VI.C. Formal Process**

172 If a student decides to file a formal grade appeal, the grade appeal must be postmarked or stamped as received by
173 the University's Academic Senate Office no later than March 15 (for courses taken during the previous Fall
174 semester) or October 15 (for Spring and Summer semesters). In the event of extenuating circumstances, the
175 Provost or designee shall be able to waive the deadline.

176 **VI.C.1. Basic Guidelines for Grade Appeals**

- 177 | a. The SGAC presumes that the grades assigned ~~is~~ are correct. It is the responsibility of the student appealing an
178 assigned grade to demonstrate otherwise. (See CSU Exec Order ~~7971037~~, p.95)
179 b. Students may only appeal grade assignments on the following bases:
180 1) an instructor refuses to (or cannot) assign a grade;
181 2) the instructor is not available to review possible computational error;
182 3) the student believes the grade assigned is inequitable or capricious, unreflective of course performance, or
183 inconsistent with other grade assignments in the course.
184 c. The SGAC shall only recommend grade changes when a preponderance of the evidence supports the student's
185 claim that the grade was improperly assigned, based on appeal grounds listed in paragraph (b), above.
186 d. The burden of proof shall lie with the student.

187
188 **VI.C.2. How to File**

189 Where informal resolution fails, the student may file a formal grade appeal in writing to the Student Grade
190 Appeals Committee (SGAC), stating the specific allegations and the desired remedy, accompanied by available
191 documentary evidence. The grade appeal must be submitted by completing the Formal Notice of Student Grade
192 Appeal form (Appendix A). Students may obtain a formal grade appeal form at the following locations:
193 Office of Associated Students Incorporated
194 Office of the Dean of Students

195
196 **VI.C.3. Filing Deadline**

197 The written grade appeal must be postmarked or stamped as received no later than March 15 for the prior fall
198 session or October 15 for the prior Spring/Summer session. In the event of extenuating circumstances, the Provost
199 or designee shall be able to waive the deadline.

200
201 **VI.C.4. Withdrawal and Termination of Formal Process**

202 A student has the right to withdraw his/her grade appeal at any stage of the proceedings, in which case the
203 proceedings shall terminate immediately. Efforts to resolve the dispute by informal means may continue
204 | throughout the formal process. Written notification by the ~~complainant~~ appellant to the Student Grade Appeals
205 Committee is required to terminate the proceedings. The Student Grade Appeals Committee address is:
206 Student Grade Appeals Committee
207 c/o Academic Senate Office
208 California State University San Marcos
209 San Marcos, CA 92096-0001

210
211 **VI.C.5. Preliminary Screening**

- 212 Upon receipt of the written grade appeal, the Chair of the Student Grade Appeal Committee will review the grade
213 appeal to determine if:
214 1) the Student Grade Appeals Committee has jurisdiction (See section "Purpose" and "Jurisdiction" page 1.); and
215 2) the filing deadline has been met; and
216 3) the informal process, steps 1 through 3 has been completed.

217 | If any the three above conditions have not been met, the Chair of the Student Grade Appeals Committee shall
218 | respond in writing, within seven (7) calendar days to the complainant stating which condition(s) has not been met
219 | and terminating the appeal.

220 | If the above conditions have been met, the Chair shall send written notice of receipt of a grade appeal within seven
221 | (7) calendar days to all parties involved in the informal process. The Chair shall also provide the instructor (the
222 | person responsible for assigning the student's grade) with a complete copy of documents submitted by the
223 | student, and request that the instructor provide a written response and relevant documentation, including the
224 | course syllabus and grade roster, to the committee within ten (10) calendar days.

225 | If the instructor identified in the appeal cannot be contacted through reasonable efforts because he/she is no
226 | longer in residence or is on leave or vacation, the committee shall provide an additional notification period not
227 | exceeding one semester. If the instructor cannot be contacted by the end of one semester it is the responsibility of
228 | other qualified faculty to review the grade (CSU Executive Order ~~792~~1037, p.5). Executive Order 1037 specifies that
229 | "Qualified faculty" means one or more persons with academic training comparable to the instructor of record who
230 | are presently on the faculty at California State University San Marcos. Typically, this is the department or program
231 | chair.

232

233 | **VI.C.6. Consideration of Grade Appeals**

234 | Upon review of documentation from the instructor and the student, the committee Chair shall establish and
235 | distribute to the principals a timeline for resolution of the appeal. If additional information is needed, the
236 | committee shall use appropriate means to collect relevant data. Any party within the University community who is
237 | contacted by the Student Grade Appeals Committee Chair for information relevant to a specific appeal shall
238 | cooperate and provide full disclosure of information. This may include, but is not limited to, requesting that the
239 | instructor(s) provide academic records such as grade roster, graded materials in his/her possession and other
240 | documents such as syllabi and assignments that may be pertinent to the appeal.

241 | The SGAC may establish and consult with a panel of 2-3 faculty members knowledgeable about grading practices,
242 | teaching strategies, or classroom management. This panel of experts shall include at least one individual from the
243 | general academic discipline or area of the course in which the disputed grade(s) occurred.

244 | a. The SGAC shall select the panel from a pool of faculty willing to serve as consultants, submitted by the chairs,
245 | program directors, or center directors of appropriate academic units.

246 | b. The panel shall not include a faculty member objected to by either the student or faculty member involved in
247 | the dispute. Either the student or faculty member may ask for the replacement of no more than two members of
248 | the panel. Such a request must be made in writing and within no more than seven (7) calendar days of the
249 | notification by SGAC.

250 | ~~€~~The SGAC shall make its recommendation in the grade appeal based on information received during its fact-
251 | finding, including information provided by the panel of faculty.

252

253 | **VI.C.7. Hearing Process**

254 | The committee shall attempt to make its recommendation on the basis of the documentation provided by the
255 | student, the instructor, and any other parties from whom it has requested information. If, by a majority vote, the
256 | committee determines a need for a hearing, the hearing process will proceed as follows:

257 | The committee shall determine who will be involved in the hearing process.

258 | The committee may seek advice from a "panel of experts" from the appropriate area as noted above.

259 | The committee may invite persons having information related to the grade appeal to testify in the hearing.

260 | The committee Chair shall reserve the appropriate facility and notify all parties involved of the hearing date(s) and
261 | location.

262 | The hearing shall be conducted according to the following standards:

263 | The hearing is a fact-finding/information gathering proceeding, not a judicial process.

264 | There shall be no confrontation or cross-examination of witnesses by instructor and the student.

265 | Only the committee and those currently providing information shall be present during that portion of the hearing.

266 | The Chair shall preside at the hearing.

267 | Only the committee members, including the Chair, shall ask questions.

268 | • All hearings will be ~~tape~~audio- or audio and video-recorded. ~~Tape R~~ecordings will be available for review by the
269 | student, the instructor, and committee members in a specially supervised place. Recordings of hearings shall only
270 | be copied for Student Grade Appeal Committee record-keeping purposes.

271 | Once all information has been received, including information obtained through hearings, the committee will
272 | issue a recommendation.

273

274 **VI.C.8. Recommendation**

275 The SGAC shall recommend one of two courses of action: that

276 (a) the original grade was properly assigned and should therefore remain on the student's record or

277 (b) the original grade was improperly assigned and the student's work should therefore be reevaluated, and the
278 assigned grade should be increased. ~~The committee shall not evaluate the student's performance nor shall it~~
279 ~~recommend a new grade.~~

280 The SGAC recommendation shall go to the instructor of record, the student, the instructor's Department Chair or
281 Program Director, the Dean of the college offering the course, the Provost, and the Office of Enrollment Services
282 if a grade change is recommended. The recommendation will be transmitted within ~~twenty-one~~ ten (10) calendar
283 days of the completion of the committee's information gathering procedures and deliberations.

284 ~~The recommendation shall not be subject to appeal.~~

285 If a grade change is recommended the instructor of record shall ~~promptly~~ notify the Student Grade Appeals
286 Committee of the course of action taken within fourteen (14) calendar days.

287 CSU Executive Order ~~7921037~~, p. ~~85~~ specifies that:

288 "If the instructor of record does not assign a grade, or if he/she does not change an assigned grade when the
289 necessity to do so has been established by appropriate campus procedure.." (i.e. SGAC recommendation), "it is
290 the responsibility of other qualified faculty to do so."

291 Executive Order ~~7921037~~ further specifies that "Qualified faculty" means one or more persons with academic
292 training comparable to the instructor of record who are presently on the faculty at ~~Cal State San Marcos~~ California
293 State University San Marcos. The qualified faculty (typically the department or program chair) shall notify the
294 SGAC of the course of action taken within fourteen (14) calendar days after receiving the SGAC's request.

295
296 **VI.C.9. Appeal of Violations of Procedure** [OM18]

297 The only possible further action after the SGAC reached its recommendations is allegation of violation of
298 procedure. Either the student or the instructor may appeal the procedure by which decision of the SGAC was
299 reached.

300 The sole basis for such an appeal shall be that the SGAC so substantially departed from the guidelines and
301 procedures set forth herein as to have seriously prejudiced the outcome of the case. It is recognized that a
302 procedurally perfect process is impossible to achieve and therefore not required to satisfy due process. It must be
303 shown that the violation has had an actual and not merely a speculative adverse effect on the final decision of the
304 grade appeal.

305 Such an appeal should be submitted to the Provost or the Provost's designee within fourteen (14) days of the
306 SGAC's official recommendations. The Provost or the Provost's designee shall reply within fourteen (14) days of
307 the appeal.

308 The Provost or the Provost's designee may:

309 (a) Reject the appeal, in this case, the decision of the SGAC shall be final; or

310 (b) Direct the SGAC to reconsider the case, correcting the prior error, and submit a report.

311
312 **VII. Annual Reports**

313 The SGAC Chair shall report to the President of ~~Cal State San Marcos~~ California State University San Marcos and
314 Academic Senate by September 1 the number and disposition of cases heard the previous academic year. (See
315 CSU Exec Order ~~7921037~~, p.97).

316
317 **VIII. Revisions to the Student Grade Appeal Policy and Procedure**

318 The Student Grade Appeals Committee, through a recommendation to the Executive Committee of the Academic
319 Senate, may initiate revisions to the Student Grade Appeals Policy and Procedures.

321 **Appendix A**[19]

322

323 California State University, San Marcos

324 Formal Notice of Student Grade Appeal

325 Instructions

326 Before completing this form, please take the time to carefully read the Student Grade Appeal Policy and
327 Procedure, paying particular attention to the basic guidelines for grade appeals (Section V.B.1.b). After reading
328 the policy and procedures, complete this form as thoroughly as possible. You may request assistance to complete
329 this form from the Office of the Dean of Students.

330 Confidentiality will be maintained in accordance with Student Grade Appeals Policy and Procedures,

331 "Confidentiality," Section IV.G.

332 Once you have completed this form, place in a sealed envelope and send it to:

333 Student Grade Appeals Committee

334 C/O Office of the Academic Senate

335 California State University, San Marcos

336 San Marcos, CA 92096-0001

337 Please type or print clearly

338 Date:

339 STUDENT INFORMATION

340 Name: Student

341 ID Number:

342 Current Address:

343 Street

344 City

345 State ZIP

346 Home Phone: Message Phone:

347 Expected Graduation: E-Mail Address:

348 CLASS INFORMATION

349 Class: Semester:

350 Title:

351 Instructor(s):

352 BASIS FOR GRADE APPEAL

353 Check all that apply and provide evidence and documentation for each basis checked.

354 The instructor refuses to (or cannot) assign a grade

355 The instructor is not available to review possible computational error.

356 The grade assigned is:

357 A result of an instructor or a clerical error

358 Inequitable or capricious

359 Unreflective of course performance

360 Inconsistent with other grade assignments in the course

361 NARRATIVE

362 Please provide a brief chronological description of the events and actions leading to the assignment of your grade.

363 Please be sure to include the names of any individuals who may have relevant information. If the space provided
364 here is insufficient, please append the entire narrative on separate, typed pages.

365

366 EXPLANATION OF THE APPEAL

367 For each box checked under "Basis for Appeal" please provide a brief explanation showing how the events and
368 actions cited in your narrative compel a change in your grade. Explain each basis separately, even if this requires
369 citing the same events more than once. If the space provided here is insufficient, please append the entire
370 explanation on separate, typed pages.

371

372 DOCUMENTARY EVIDENCE

373 Please append any documents that support your appeal (e.g., copies of your work, copies of correspondence with
374 your instructor or other individuals involved with your appeal). In the space below, please list the documents you
375 have appended.

376 DOC. NO. DATE DOCUMENT TITLE AND DESCRIPTION

377 1.

- 378 2.
- 379 3.
- 380 4.
- 381 5.
- 382 6.
- 383 7.
- 384 8.
- 385 9.
- 386 10.
- 387 11.
- 388 12.
- 389 13.
- 390 14.
- 391 15.

392
393 REMEDY SOUGHT

394 ACKNOWLEDGEMENT AND RELEASE

395 I have received and read the Student Grade Appeals Policy and Procedures and understand what I am required to
396 do in the Formal Grade Appeals Procedures.

397 Initials_____

398

399 I hereby release to the Student Grade Appeals Committee all documents, including my academic records, that
400 may be pertinent to the Committee's investigation.

401 Initials_____

402 I certify that, to the best of my knowledge, the information I have provided is accurate and the circumstances
403 surrounding the problem are as I have described them.

404 _____

405 Signature Date

406 INFORMAL RESOLUTION LOG

407 DATE PERSON(S) CONTACTED ACTIONS AND OUTCOMES

Standing Committee Reports

APC

Currently working on:

- Excess Units Seniors policy
- Inactive Courses policy
- Multiple Major policy
- TOEFL score requirement
- Length of / Max. no. of units in / Add-Drop period for winter intersession
- Second Bachelor's Degree policy

BLP

Currently working on:

- Program Proposals: We have submitted our evaluation of the proposed new Option for the Bachelor's of Science in Business Administration (P-form, program developed for delivery at Temecula site) and a proposed waiver program (Single-Subject Preparation in History/Social Science).
- Other Business:
 - Academic Affairs Long-Range Planning and Budget Planning Cycle process: BLP members met with the Provost's Academic Advisory Leadership Council (AALC) on March 1 to discuss the Division's development of goals that will help drive its planning and budgeting into the next 3-5 years. We will meet with them again on April 5 to discuss draft language for these goals.
 - Self-Support: BLP has been assigned several tasks regarding the use and expansion of self-support program offerings, and we continue to work on these. For example, we should have a draft revision of the A-form ready for the next Senate meeting.

FAC

Currently working on:

GEC

Currently working on:

- Finalizing GELOs (learning objectives) for Areas A-C
- GE Handbook
- ongoing course proposal reviews, GELOs, and areas for diversity, global, interdisciplinarity

Will work on this next:

- Academic Senate Chair referral to consider impact of upper div GE on multiple majors

LATAC

No report.

NEAC

Currently working on:

- filling open committee seats.
- soliciting nominations for next year's committee seats.

Will work on this next:

- evaluating the effect of the rule that only tenured faculty can serve as AS committee chairs
- determining whether to put more explicit language about shared governance in the constitution

PAC

Currently working on:

- PAC is awaiting the Academic Senate's response to the draft Program Review Policy and working on its response to the Women's Studies Program Review

Will work on this next:

- The committee's response to the Social Science Program Review.

SAC

Currently working on:

- Revision of Student Grade Appeals Policy: SAC has been working on the revision. Provided for your reading enjoyment (see attachment so the agenda).
- Revision of the Course Records Management Policy to include the proper handling of electronic records: SAC consulted with IITS and other university units (as needed) to include this issue of growing importance. It appears that the only area in which no guidelines exist relate to how individual faculty handle / keep electronic records (class rosters, electronically graded material, email correspondence related to class performance, etc.). IITS informed SAC that Cougar Courses materials are kept indefinitely. The university has already a schedule related to what student records are kept, how, and for what length of time (as sanctioned by the CSU system).
- Guest visits: a series of student-affairs functionaries has presented to SAC. Since the beginning of Spring 2011 semester, SAC was informed about Campus Recreation (by Hugo Lecomte), the Career Center (Pam Wells), and the Student Health and Counseling Center (Dr. Karen Nicholson)
- SAC has representatives in both CUGR (V. Dalakas) and the IP Task Force (P. Ly).

UCC

Currently working on:

- Curriculum reviews: detailed list of review proposals and status can be found at http://www.csusm.edu/academic_programs/curriculumscheduling/catalogcurricula/2010-11_curriculum.html
 - List of completed P2/C/C2 proposals can be found from Consent Calendar
 - List of New Programs approved for forwarding to the Senate for further discussion:
 - CoBA BSBA Program for Temecula
 - CoE: Single Subject/English Learner Authorization and Preliminary Mild/Moderate Education Specialist Credential
 - SoN package has been reviewed. Most of the proposals approved. Waiting for a conversation between Academic Programs office and SoN to identify a satisfactory solution to address the course numbering issue.
 - CHAD program: UCC resumed its review on the CHAD program which originally started at 2007. UCC decided that new signatures from the impacted departments shall be obtained since it has been 4 years from the original signatures signed. UCC will start the detail
- C form revision

Will work on this next:

- More curriculum reviews
- C form revision